



Kristel's Tax and Accounting

Tax Professionals trusted since 1972

5018 Madison Ave
Indianapolis, IN 46227
(317) 783-6696
Fax (317) 781-4652
www.kristeltax.com

Enclosed is your requested mail-in packet. Whether you choose to mail us your income tax information or email it to us (*contact Sara to request our new secure portal*), or you just want something to help organize your information before dropping it off or coming in for a face-to-face tax appointment; it is designed to help you.

Enclosed is:

1. [Client Information](#) - To provide us with your contact and basic information.
2. [What to Bring](#) - A list of items you need to include for us to prepare your return.
3. [Dependent Questionnaire](#)
Complete and sign this ONLY if you have dependents, one for each dependent is required.
4. [Head of Household Questionnaire](#)
Complete and sign this ONLY if you are filing as an unmarried head of household individual with children.
5. [Taxpayer Consent to Release](#)
Complete and sign this to correspond via email or if someone other than you will need access to your tax return.
6. [Copy of our Privacy Policy Notice](#) - We are required to provide.

If you had health insurance through Market Place (Healthcare.gov) Please INCLUDE a copy of your 1095-A

Once your return is completed, we will contact you upon completion. The electronic filing forms must be signed and returned, and we need to receive payment BEFORE we can e-file your return.

You may mail these signed forms back to us,
e-mail them to us,
or fax them to us (1-317-781-4652).

We don't necessarily need the originals, just your signatures on the required forms. If we have any questions regarding your tax information, we will contact you using the information shown on the Client Information Form. If you have any questions, please call us at (317)783-6696 or 1-800-844-2293 or you can email your tax preparer directly.

Check our website for more helpful information at www.kristeltax.com

PLEASE RETAIN THIS FOR YOUR RECORDS

Enrolled Agents are the ONLY Tax Professionals who have passed an exam in Tax Law and are licensed by the federal government to practice before the IRS.

Client Information

Primary Taxpayers Name as it appears on S.S. Card _____

- SSN _____ Date of Birth _____
- Taxpayer Cell Number _____ Email _____
- County of Residence as of Jan 1st _____ County of Employment as of Jan 1st _____
- DL or State ID# _____ Issuing State _____ Issue Date _____ Exp Date _____

Spouses Name as it appears on S.S. Card _____

- SSN _____ Date of Birth _____
- Taxpayer Cell Number _____ Email _____
- County of Residence as Jan 1st _____ County of Employment as of Jan 1st _____
- DL or State ID # _____ Issuing State _____ Issue Date _____ Exp Date _____

Address _____

City _____ IN _____ Zip _____ Cell Phone _____

Referred by a Friend Y / N _____ NAME _____

Dependents

Number of dependents being claimed on this tax return? _____

- SSN, DOB, and Dependency Questionnaire are required for each dependent being claimed.
- If you are claiming childcare expenses the end-of-year statement from all childcare providers will be required.
- Non-Custodial parents claiming dependent children are required to have a signed Form 8332.

Proper Tax / Renters Deduction

Homeowners – *If you do not have a 1098 mortgage statement or proof of payment(s) complete this section.*

- Property Tax Paid on Primary Residence \$ _____
- Primary address if different than above: _____
- Property Tax Paid on Additional Properties \$ _____

Renters

- Landlords / Leasing Office Name: _____
- Landlords / Leasing Office Address: _____
- # of months rented in tax year _____ Amount paid per month \$ _____

Estimated Tax Payments

Federal (IRS)

State (DOR)

1st Qtr Date Paid _____ \$ _____ 1st Qtr Date Paid _____ \$ _____

2nd Qtr Date Paid _____ \$ _____ 2nd Qtr Date Paid _____ \$ _____

3rd Qtr Date Paid _____ \$ _____ 3rd Qtr Date Paid _____ \$ _____

4th Qtr Date Paid _____ \$ _____ 4th Qtr Date Paid _____ \$ _____

Consent to Release

A **Signed Consent** form must be on file before any tax return can be emailed, released, or discussed with anyone other than the taxpayer and / or spouse.

Items Needed to complete your return

Please bring all that apply to you

NEW clients bring:

1. Copy of prior year tax return
2. Picture ID & Social Security Cards
3. Birthdates for everyone on tax return

Income Information

- ◆ W2(s) Employment Income
- ◆ 1099-G(s) Unemployment Received
- ◆ 1099-NEC(s) Non Employee Compensation Income
- ◆ W2-G(s) Gambling Winnings and losses per win
- ◆ 1099-R(s) Retirement/IRA Distributions
- ◆ 1099-SSA(s) Social Security Received
- ◆ 1099-INT(s) Interest Income
- ◆ 1099-DIV(s) Dividends Income
- ◆ 1099-B(s) Sale of property/investments
- ◆ Farm income and expenses
- ◆ Form K-1(s) Partnerships, Trusts, S-Corps
- ◆ 1099-MISC(s) Miscellaneous Income
- ◆ Any additional income not listed

Sch A-Itemized Deductions (if Qualify)

- ◆ Property (Real Estate) Taxes paid
- ◆ 1098(s) Mortgage Interest paid
- ◆ Premium Mortgage Insurance (PMI)
- ◆ Excise tax paid on vehicle plates
- ◆ Out of pocket medical expenses (excess of HSA used)
- ◆ Medical mileage
- ◆ Donations made to charitable organizations
- ◆ Charitable mileage

Other items, Deductions & Credits

- ◆ Form 8332 to Claim any Non Custodial Dependent
- ◆ Estimated tax payments (Dates & amounts made)
- ◆ Rent Paid including Landlord's Name and Address
- ◆ Educator Expenses Out of Pocket
- ◆ 1098-E Student Loan Interest paid
- ◆ Indiana College Choice 529
 - ➡ Contributions \$ and account #'s
- ◆ Child Care expenses paid
 - ➡ Provider name, address
 - ➡ identification #, amount paid per dependent
- ◆ 1098-T College Education expenses paid
- ◆ Private School costs for dependents
- ◆ Energy Efficient Home Improvements
- ◆ Electric Vehicle Purchases
- ◆ 1095-A (Marketplace insurance if applicable)
- ◆ 1099-SA(s) Health Savings Account Distributions
- ◆ Bank Information for direct deposit / balance due
 - ➡ Bank Routing & Account #'s

Schedule C Worksheet Self Employed

Businesses / or Contractors

- ◆ Business Name and Address (if any)
- ◆ Federal ID # (if any)
- ◆ Gross Business Income
- ◆ Office in Home?
 - ➡ Total square foot of home and office
 - ➡ Utilities paid on home except water
 - ➡ Homeowners Insurance paid

Retail Businesses:

- ◆ Material and Supplies Purchased
- ◆ Beginning and Ending Inventory
- ◆ Merchandise Purchased for Resale

Business Expenses:

- ◆ Advertising
- ◆ Materials and Supplies Purchased
- ◆ Business Mileage
 - ➡ Travel Log Totals-Per Vehicle
 - ➡ **OR** Vehicle expenses(actual expenses)
- ◆ Contract Labor / 1099's issued
- ◆ Equipment Rental Expenses
- ◆ Gross Payroll Wages & employer taxes paid
- ◆ Travel Expenses
- ◆ Travel Meals (while away overnight)
- ◆ Mortgage Interest, Real Estate Taxes, Insurance
- ◆ Rent and Utilities Paid on Business Property
- ◆ Repairs and Maintenance (non-vehicle)
- ◆ Office Expenses
- ◆ Tools and Uniforms
- ◆ Legal and Professional Fees
- ◆ Insurance
 - ➡ Liability & Workman's Comp
 - ➡ Self-Employed Health Insurance Paid

Schedule E Worksheet for Each Rental Property

- ➡ Rental Property Address
- ➡ Cost or Value & Date Placed in Service
- ◆ Rents Received
- ◆ Advertising Costs
- ◆ Cleaning and Maintenance
- ◆ Improvements that increase rental value
- ◆ Property Taxes & Mortgage Interest
- ◆ Legal and Professional Fees
- ◆ Management Fees
- ◆ Rental Related Mileage
- ◆ Repairs and Supplies
- ◆ Utilities you paid on Rental
- ◆ Insurance (other than health)

IRS Requires Income Tax Preparers to have proof of amounts provided to them "before" preparing a business form. Be prepared to provide a written or printed document containing all business totals to the preparer. Check out our website for helpful worksheets. kristeltax.com

TAXPAYER CONSENT TO RELEASE TAX INFORMATION

Mandatory statements required by IRS Rev Proc 2013-14 dated January 14, 2013

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.

► The law states if you do not specify the duration, it's valid for one year from date of signature.
Please specify an **Expiration Date:** **Exact Date** _____ or **2 Years** or **3 Years**

I, _____ authorize **Kristel's Tax & Accounting**
taxpayer's name as shown on the tax return

to disclose: _____ to
what information, including year (ie tax return, W-2's, etc.)

Method of Delivery (Required):

- ➔ **Pick up** Name _____
- ➔ **Phone** Name _____ Ph Number _____
- ➔ **Mail** Address _____
- ➔ **Fax** Attention _____ Fax Number _____
- ➔ **E-mail** E-mail Address _____

Please Note: e-mail can **NEVER** be guaranteed as a safe form of delivery

Taxpayer Signature: _____ Date: _____

A copy of your ID MUST be included to be considered valid.



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5018 Madison Av Corner of Thompson & Madison

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Privacy Notice

This notice is provided to you in accordance with the Gramm-Leach-Bliley Act in relation to the privacy requirements of financial institutions, including tax preparers.

In conducting our business, we obtain certain nonpublic personal financial information about you. This includes information we receive from you and information we may receive from the Internal Revenue Service or a State Department of Revenue.

Access to this information is restricted to individuals in our office only on a need-to-know basis in order to provide the services you are requesting.

We do not, and will not, disclose any information we obtain from you or about you to anyone without your written permission and valid ID.

If you want any of your information sent to anyone, we have a "Taxpayer Consent to Release Information" form that must be signed by you indicating what information you want sent and where you want it sent. This form must be in our possession before we will send any information to anyone, such as mortgage companies, rental agencies, attorneys, or other family members. We discourage information being sent by e-mail or fax for various security reasons but will do so at your specific direction.

We also require the "Taxpayer Consent to Release Information" form be signed by you if you would like someone other than you to pick up your tax return.

If you have any questions or concerns about our privacy policies, please make them known before you disclose any information about yourself to us.