2025 Becky's Tax Service Client Organizer-Please complete the front and back.

Returning clients: We have your SS# and DOB of those listed on your prior year return. You do not need to list that. Please complete ALL the other information. **It is very important that you fill in the other information regarding your dependents.** ****IF you can be claimed on someone else's return (parents), check here __________****

Name: ____ **Soc. Sec. #:** ___________________ **DOB:** _____________________

Spouse's Name: ______________________________ **Soc. Sec. #:** ____________________ **DOB:** _____________________

Address: ____ City**:** _________ **State:** _________ **Zip Code:** ____________

Is the address new? Y or N **Cell Phone/Telephone:** _______________ **Email:** _________________________________

Filing Status: Single ____ Married-Joint____ Married-Separate ____ Head of Household ____ Qualifying Widow ____

If you are filing Head of Household, do you provide a home and more than ½ of the support for your dependents? ___ Y or ___N Do you have documentation to keep with your taxes to prove this? ___Y or ___ N

Dependents Name and Relationship to Taxpayer	**Date of Birth**	**Social Security Number**	**More than half the year?**	**# of Months in your Home.**	**Is your dependent in daycare?**	**Is your dependent in college?**	**Can anyone else claim them?**
			Y or N		**Y or N**	**Y or N**	**Y or N**
			Y or N		**Y or N**	**Y or N**	**Y or N**
			Y or N		**Y or N**	**Y or N**	**Y or N**

If you are claiming a child that does not live with you for more than half the year, you will need to have the custodial parent complete Form 8332 which is a Release of Exemption for Child form. Please ask for additional form if you have more than three dependents.

INCOME TAX PREPARATION AND/OR BOOKKEEPING AGREEMENT-Please read carefully.

This letter is to confirm our understanding of the terms and objectives of our engagement and the nature and limitations of the income tax or bookkeeping services we will provide to you from Becky's Tax Service, LLC.
We will prepare your Federal and State income tax returns and/or Bookkeeping Services from the information you furnish to us. We will not audit or otherwise verify the data you submit, although we may ask you to clarify some of this information.

The Internal Revenue Code requires you to have documentation for all your deductions and your signature indicates your compliance with those requirements**.** ***You have the final responsibility for the handling of each item on the return and the overall correctness of the return.***

Your tax returns are subject to review by the taxing authorities. It is your responsibility to be able to provide all records supporting the information on your tax return. You should keep your records for at least 7 years, a business should keep records for as long as they have the business, plus 7 years. Billing for service regarding IRS questions will be based on the nature of the services provided at that time. If there is additional tax due, you are responsible for the total additional tax, penalties and interest. If the error is due to calculation on the part of Becky's Tax Service, LLC we will pay the penalty. ***YOU will still be responsible for the tax and interest as you made use of the funds from the date of the original filing.***

Payment for tax services is due at the time of completion and at the time the returns are picked up. Fees are calculated on the number of Forms completed, considering the amount of time spent preparing your return, any special level of expertise and the size and scope of the matters involved. Electronic filing of a tax return is included at no charge if we prepare the return. If the above fairly sets forth your understanding of our service arrangement, please sign this letter of acceptance. The information and documents that you have provided to Becky's Tax Service LLC for the preparation of Federal and State tax returns are true and accurate to the best of my knowledge.

Taxpayer: ________________________________ Spouse: ______________________________________ Date: ____________

2025 Tax Questions-Please indicate Yes or No (If you leave it blank, we will presume your answer is NO.)

At any time during 2025 did you or your spouse receive income from the following sources?
Please indicate Yes or No (If you leave it blank, we will presume your answer is NO.)

_____Wages? Tips? **Provide copies of all W-2's and your last pay stub if you receive tips or have overtime. This is an IRS requirement to be eligible for any credits.**
_____Interest or Dividends: Provide 1099 INT and 1099 DIV
_____Social Security or Railroad Retirement: Provide SSA 1099
_____Stock sales, mutual funds, bond or other non-business assets or investments: Provide 1099-B and Cost Basis
_____Distributions from retirements, pensions, IRA or annuities: Provide 1099-R
_____Unemployment Compensation: Provide 1099-G
_____Did you receive alimony? How much? ______ Is the order prior to Jan. 1st, 2019 _____Y _____N
_____Income from Partnership, S-Corp, Estate or Trust: Provide Schedule K-1
_____Did you operate a farm or business? _____Y _____N Do you have a business in your home? _____Y _____N
_____If you operate a farm or business, have you completed the Income & Expense Worksheet with yearly totals?
_____Do you have rental income? Did you complete the Income & Expense Worksheet with yearly totals?
_____Did you have Gambling Income? Provide W-2G and details of winnings and losses.
_____Did you have other income? Prizes, jury duty, cancellation of debt, hobby income or any other income?
_____Do you have any foreign income or interest in foreign income or assets?
_____Do you have virtual currency or assets? WE MUST HAVE DOUCMENTS FOR THIS!
_____Did you have a sale, foreclosure or abandonment of your personal home, vacation home or other property?
_____Do you receive child support or other non-taxable benefits? We only need this for the purposes of calculating WI Homestead Credit $________________ Amount Received
_____Did you purchase a brand new 2025 car/truck? (Not New-To-You/Used) Where was it manufactured? ________
VIN # ____ Model Year ____

Y or N Please indicate Yes or No (If you leave it blank, we will presume your answer is NO.)

_____Pay Alimony-Amount: ___________________ SSN and Name of Recipient: __________________________________
_____Have a mortgage on a first or second home? Provide 1098 Mortgage Interest Statement from Lender
_____Refinance your home or take out a home equity loan? Provide add 'l 1098 Mortgage Interest Statement
_____Pay Real Estate Taxes on your personal, vacation house or land? Provide Tax Stmts for amounts paid in 2025
_____Purchase or sell a home? Please Provide Closing Statement
_____Did you make any Energy Efficient Home Improvements? (Windows, Doors, Insulation, Roof, HVAC)
_____Pay medical expenses, health insurance (do not include pretax amounts), qualified Long-Term Care?
_____Make contributions to a charitable organization? *You MUST have received receipts and kept them*. $_____________
_____Contribute to an IRA, SEP, Roth or Simple Retirement Plan on your own? (Do not include 401k)
_____Pay private school tuition? How much? $__________ Name of School & EIN _______________________________
_____Have College Education Expenses for any one in the family? Provide 1098-T form from the enrolled member.
_____Pay interest on a Student Loan? Provide 1098-E
_____Pay for any Teacher/Educator/Aide expenses for your classroom, books or supplies? $_____________________
_____Have any births, deaths, marriage or divorce in 2025? (Documents req'd, birth cert., SS card, court docs.)
_____Did you make any contributions to a Health Savings Account? Provide HSA Forms
_____ Did you contribute or take a distribution from a Qualified Tuition Savings Plan? Provide 1099-Q
_____Receive Payments from a Long-Term Care Contract? Provide 1099-LTC
_____Did you pay any Federal or State estimated Tax payments? Include the amounts and dates.
_____Did you pay rent in WI? $ ____________ Total—Was heat included Yes or No—If your household income is less than $25,000, please provide a rent certificate, you may qualify for WI Homestead Credit.
_____Did you buy any products out of state, or on the internet for use in WI that you did not pay sales tax on $______

The IRS is requiring direct deposit for all refunds, please provide the following information:

Bank Name: ____

Routing Number: ______________________________ Account Number: ____

Please provide a voided check or a letter from your bank with the above banking information if there has been a change since your last filing with Becky's Tax Service LLC.