*472 Ohio Avenue Rochester, PA 15074*

Mobile Tax Services Inc.

*Phone: 724-777-6334*

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**2023 Income Tax Filing Season**

***Engagement letter***

Mobile Tax Services Inc. prepares your income tax return based on information provided by you, the taxpayer(s). We expect all information to be correct. We do not accept liability for false information. This will allow us to file your taxes accurately. It is important that you be able to support your deductions or claim for credits with proper documentation. In the event of an audit, although we will help you to prepare, we cannot provide you with documents to support your claim for credits or deductions. That responsibility will rest with you.

If you select the option to have your return filed electronically, (Direct Deposited or Refund Transfer from the bank), you acknowledge that fees will be deducted from your anticipated federal or state income tax refund. These fees are separate from Mobile Tax Services Inc. preparation fees. Also, you acknowledge that if your income tax is withheld for past due student loan, child support, etc., you will be liable for fees that are due to Mobile Tax Services Inc..

have read the above statement and understand it fully. Furthermore, I certify that no false information has been given.

Client's Signature Date Spouse Signature

**\*\*\*\*IF YOU ARE A NEW CLIENT, KINDLY PROVIDE US WITH A COPY OF YOUR PRIOR YEAR TAX RETURN. WE WILL PROVIDE YOU WITH A FREE COPY OF YOUR 2023 FEDERAL AND STATE(S) TAX RETURNS. PLEASE DO NOT LOSE IT. IF YOU RETURN AT A LATER DATE FOR AN ADDITIONAL COPY YOU WILL BE CHARGED $20.00 PER YEAR REQUESTED.\*\*\*\***

Thank you for your patronage.

***Mobile Tax Services Inc.***

Last Name: First Name: Mid In: \_ Sp Last Name: First Name: Mid In: \_ Social Security#: Sp Social Security#: \_

Birth Date: Sp Birth Date: Address: City: State: Zip: \_

Phone: Work Phone: Cell Phone: ---------

Sp Cell Ph: Email:

Occupation: Sp Occupation:

# Dependent Information

*\*\*\*If your child wos o student, up to age14, and worked, they moy have to file o return and you can still claim them as a dependent on yours. Be sure to let us know your child's exact situation to determine correct filing methods. Additionally, the IRS requires proof of residency for any dependents that qualify for Earned Income Credit or Child Tax Credits.*

*The child and dependent care tax credit, which may help offset the cost of care for children under age 13 or adult dependents, has also been reduced for 1011. In 2011, the credit jumped to up to $8,000 for one qualifying person or $16,000 for two or more dependents. However, for 1011, those cops returned to $3,000 and $6,000, for one or multiple dependents, respectively.*

Name Relationship SS# DOB

# Dependent Care/Day Care Information

Name or Institution of Care Provider: Address: --------------------------------

City: EIN# or Social Security#: (9 Digits)

Amount paid per child (yearly amount):

State: Zip:

$ \_

# Miscellaneous Credits/Deductions...

Uniform$---

Prior yr tax prep fees $ \_

Charitable Contributions$---

Union dues$---

Medical Expenses$ Training classes$ \_

 Other(specify) $

Tuition Expenses$ *(Provide Proof of Payment).* Name of School: \_ School Address:$

Did you reside in more than one state in 2022? Yes No.

If so, what state did you reside on 12/31/2022? \_ What date did you move into that state? What state did you reside prior to moving? \_ How much total rent did you pay last year? (New Jersey residents only)$ \_

# Income Tax Refund Delivery Method

How would you like your tax refund disbursed? (A) Direct Deposit into your bank account,

 (B) Cashier's Check, (C) Pre-Paid Visa Debit Card (We issue it to you)

**\*\*\*\*If you select a check you must come in and pick it up. We cannot mail you your refund check. There's no difference in cost for Direct Deposit or Check.**

*(Direct from IRS doesn't hove bank fees attached ta it; however, you'll have to pay aut af pocket far services before we can electronically file*

*your return)*

9 Digit Routing#: \_ Account Type: \_

Account: \_ Bank Name: ----------

# Mandatory Security Question For 2023

What is your Mother's Maiden Name?

Do you own a single-family home? Do you own a multi-unit dwelling?

\_Yes No

Yes No

If you indicated a single-family home, did you live there or rent it out? If you indicated a multi-unit dwelling, how many units is it?

Do you occupy one of the units in your multi-unit dwelling? \_Yes No

What is the total amount of rent that you ***collected*** last year?$

What were the total property taxes paid on your property?$ What was the total mortgage interest and points that you paid?$

***DO NOT INCLUDE ANY OUT-OF-POCKET EXPENSES TOWARDS THE MAINTENANCE AND UPKEEP OF YOUR PRIMARY RESIDENCE.***

Did you incur any out-of-pocket expenses towards the maintenance and upkeep of your rental property? Yes or No

If so, use the space below to indicate what the expenses were, and how much they cost.

$

$

$ \_

$

$ \_

$

$

***(Only use this form if you are self-employed, have a small or home-based business, or receive 1099-Misc income from a company that you are not an employee of)***

1. Business Name:
2. What was your Gross Income for the year?$ \_
3. What is the legal structure of your business? (Circle One) C-Corp, S-Corp, LLC, Partnership, Sole Proprietorship.
4. Is this a home-based business? Yes or **No**
5. What is the address of your business?
6. Do you have employees? If so, we will need information on your payroll and quarterly filings (940 and 941's).
7. Do you collect sales tax on resale items? Yes or No
8. Do you have a Federal Tax Identification Number? If so: \_
9. Have you made any estimated quarterly tax payments? Yes or No
10. Do you have a business use vehicle? Yes or No

***\*\*\*All amounts are annual costs\*\*\****

Advertising:$ Rent:$-----

Office Supplies: $ \_ Utilities: $-----

Licenses:$-----

Postage: $ \_

Professional fees: $----- Uniforms:$----- Meals/Entertainment:$

Insurance: $----

Tools:$-----

Wages:$ \_

Permits & Fees:$ ---- Vehicle:$---- Legal:$ \_

Maintenance: $-----

Travel:$-----

Misc:$ \_

Other Business Expense information that you feel may be helpful in preparing your return: