



➔ If you received the Advanced Child Tax Credit, please provide form 6419

***Did you receive the Third Economic Impact Payment? Yes No \$_____**

Do you authorize Ron's Tax Service as a third-party designee to discuss this return with the IRS Yes No

Do you authorize Ron's Tax Service as a third-party designee to discuss this return with State? Yes No

Do you wish to purchase Audit Assistance from Protection Plus @ \$64.95 (3 years) Yes No

How were you referred to us? Name: _____

Can you or your spouse be claimed on another tax return for any purpose? Yes No

Taxpayer

Social Security Number: _____ Date of Birth: _____

Name: _____ Middle: _____ Last: _____

Home#: _____ Cell#: _____ Carrier _____

*Email: _____ Occupation: _____

Address: _____

City: _____ State: _____ Zip: _____

What is your filing status?

- Single
- Married Filing Joint
- Married Filing Separate
- Head of Household
- Widow

Spouse

Social Security Number: _____ Date of Birth: _____

Name: _____ Middle _____ Last _____

*Email: _____ Occupation: _____

Home#: _____ Cell#: _____ Cell Carrier _____

Did you purchase Health Insurance coverage from the Market Place? Yes or No

If yes, please provide form 1095-A from Covered California



DEPENDENTS

Full Name as it appears on social security card (Do NOT include you or spouse)

Name	DOB	SSN	Relationship	Disabled

Was there any childcare paid for? _____ Amount \$ _____

If yes Name of provider _____ Social security# or EIN _____

Address where child was cared for _____

Phone number _____

What documentation can you provide

Social security cards Yes or No Court Documents Yes or No Birth Certificates Yes or No

School Records Yes or No Medical Records Yes or No

Are you claiming any children that are not yours? _____ IF NO SKIP TO NEXT PAGE

Do you have legal custody? Yes or No

If yes, where are the parents _____

Why aren't the parents claiming their child? _____

Is the other parent living in the same household as child?

If YES, is your earned income more than the parents?

What are the parent's names?

Mother _____

Father _____

If the child's last name is different explain?



EDUCATION

Did anyone attend a college or trade school during the year? Yes or No

How many years have you claimed the education credit? _____

Do you have a 1098T? Yes or No

If no what documentation do you have? _____

Total school Expenses \$_____

Name of educational institution: _____

Address: _____

Taxpayer

Driver's License # _____ State _____

Issue Date _____ Expiration Date _____

Spouse

Driver's License # _____ State _____

Issue Date _____ Expiration Date _____

Direct Deposit Yes or No

Bank Name _____

Routing# _____

Account# _____

I/we have provided true, correct, the best of my/our knowledge complete information on all financial data & bookkeeping to Ron's Tax Service and tax preparer. I/we are required to hold financial documents to all data provided for at least four years. I/we will be required to read and look over finished tax forms before signatures for corrections, accuracy, and understanding of personal and or business taxes. Once printed and signed I/we will be responsible for the tax forms and will not hold Ron's Tax Service and tax preparer liable. Under penalties of perjury, I declare that I / we have read and understood the statement.

Taxpayer: _____ Date: _____

Spouse: _____ Date: _____



RON'S TAX SERVICE



PERSONAL DEDUCTIONS

SINGLE \$12,550

MARRIED FILING JOINT \$25,100

HEAD OF HOUSE \$18,800

MARRIED FILING SEPARATE \$12,550

Medical and Dental	\$		
Car Registration Fees	\$	Supplies	\$
New Car Sales Taxes	\$	Tools	\$
Real Estate Taxes	\$	Theft loss	\$
Personal Property Taxes	\$	Equipment	\$
Mortgage Interest	\$	List other expenses below	
Second Mortgage Interest	\$		\$
Cash Contributions	\$		\$
Non-Cash Contributions(clothes)	\$		\$
Union Dues	\$		\$
Uniforms	\$		\$
Cell Phone	\$		
Legal and professional services	\$		
Prior Year Tax Preparation Fee	\$		
Educator expenses	\$		
Gambling Winnings	\$		
Losses up to winnings	\$		

What type of documentation do you have? _____

How did you come up with this figure? _____

Do you have documentation to support your expenses? Yes or No

I/we have provided true, correct, the best of my/our knowledge complete information on all financial data & bookkeeping to Ron's Tax Service and tax preparer. I/we are required to hold financial documents to all data provided for at least four years. I/we will be required to read and look over finished tax forms before signatures for corrections, accuracy, and understanding of personal and or business taxes. Once printed and signed I/we will be responsible for the tax forms and will not hold Ron's Tax Service and tax preparer liable. Under penalties of perjury, I declare that I / we have read and understood the statement.

Taxpayer: _____ Date: _____

Spouse: _____ Date: _____

RON'S TAX SERVICE

INDIVIDUAL AND BUSINESS TAX RETURN ENGAGEMENT LETTER

Preparation of Your Tax Returns

Dear: Taxpayer

Thank you for selecting RONS TAX SERVICE to assist you with your tax affairs. This letter confirms the terms of our engagement with you and the nature and extent of services we will provide. To assure mutual understanding of our responsibilities, we ask you to read this letter and confirm the arrangements by signing and returning a copy to us.

General Firm Responsibilities

We will prepare your 2021 federal and all state income tax returns you request using information you provide to us. We will process the returns and provide you with copies for your records. We may ask for clarification of some items, but we will not audit or otherwise verify the data you submit.

General Client Responsibilities

It is your responsibility to provide information in a timely manner required for preparation of complete and accurate returns. You should keep all documents, canceled checks and other data that support your reported income and deductions. They may be necessary to prove accuracy and completeness of the returns to a taxing authority. You agree to report all your taxable income, including any bartering, partnership interests, sales of assets, and all investment income from all sources.

You are responsible for the returns, so you should review them carefully before you sign them. When you sign the return, or the electronic substitute, you declare that you have examined the return, including all the accompanying schedules and statements, and that they are true, correct, and complete, to the best of your knowledge and belief.

Client Substantiation Requirements

Our work will not include any procedures to discover defalcations or other irregularities. The only data or analysis work we will do is that which is necessary for preparation of your income tax returns.

Conflicts of Interest, Due Diligence and Favorable Interpretation

We must use our judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. In order to avoid penalties, we will apply the "more likely than not" reliance standard to resolve such issues. You agree to honor our decisions regarding the need to make protective disclosures in your returns.

Penalties of as much as \$100,000 can be imposed on you for failing to disclose participation in "reportable transactions," that is, certain arrangements the IRS has identified as potentially abusive. We will insist that all such transactions be properly disclosed.

The law also imposes penalties when taxpayers understate their tax liability. If you have concerns about such penalties, please call us.

Your returns may be selected for audit by a taxing authority. Any proposed adjustments are subject to appeal. In the event of a tax examination, we can arrange to be available to assist you. Such assistance will be a separate engagement for which an engagement letter will be provided to you. Fees and expenses for assistance with the returns will be invoiced in accordance with terms we agree on for that engagement.

Firm Fees and Record Retention Policy

Our fee for preparation of your tax returns will be based on the amount of time required at standard billing charges plus out-of-pocket expenses. All invoices are due and payable upon presentation. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days. If you choose to terminate this engagement once signed Ron's Tax Service has the right to charge a \$175/per hour fee. Any assistance fees and expenses for defending client's return(s) will be invoiced in accordance with terms we agree on for that engagement.

We will retain copies of records you supplied to us along with our work papers for your engagement for a period of seven years. After seven years, our work papers and engagement files will be destroyed. All your original records may be returned to you at the end of this engagement. You should keep the original records in secure storage.

Client Signature

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign this letter in the space indicated below and return it to us.

We appreciate having you as a client. Please contact us if you have questions.

Sincerely,

RON'S TAX SERVICE



TAX PROFESSIONAL IN CHARGE

(Both taxpayer and spouse must sign for preparation of joint returns)

Accepted By:(T)_____Date:_____
Taxpayer

Accepted By:(S)_____Date:_____
Spouse