



CONSENT TO PREPARE TAX RETURN

I, _____, have authorized SAAVY TAX PREPARATION & SOLUTIONS (STPS) and any authorized representative of the company to prepare my/our federal, state and/or local tax return(s). The company claims no responsibility for the return(s) other than preparing the said return(s). The accuracy of the return(s) will be related to the company. The information received by the taxpayer will be used in compliance with the rules and regulations of the INTERNAL REVENUE SERVICE (IRS).

I agree to electronically sign all documents that may require a signature to complete my tax return including the bank application.

Two forms of identification such as a social security card or a form of picture identification should be presented to the preparer during service. We will use your check stub information for ESTIMATES ONLY. **You must provide our office with the appropriate documents such as a W-2, 1099, 1098, childcare information, college/tuition information, mortgage information and any other required documents that will allow your tax return to be e-filed to the IRS.** We will supply you with a digital/paper copy of your tax return which should be kept in a safe and secure place once in your possession. Additional copies are available upon request for a nominal processing fee.

In the event of an electronic filed tax return refund, STPS makes no claim or guarantees concerning expected refund dates. After electronic transmission, any delays caused by the IRS, Bank(s) and/or any other government agencies involved are not the responsibility of STPS.

By signing this consent agreement, you have agreed to fully compensate and authorize STPS to prepare your tax return(s). When payment of services are rendered, it is to be electronically deducted from your refund; the taxpayer(s) is/are fully responsible for any unpaid balance. Any outstanding balance must be paid in full during the time the services are rendered. The taxpayer(s) will be responsible for all fees and expenses, including collection fees, attorney fees, damages, court cost and interest that may incur by STPS in collecting the unpaid debt. STPS will have the right to report to any Credit Reporting Agency using any information provided.

TAXPAYER:

LAST FOUR SSN:

SPOUSE:

LAST FOUR SSN:



20 CLIENT CONFIDENTIAL PROFILE

TODAY'S DATE _____
PREPARER'S NAME _____
REFERRED BY _____
WALK-IN (Please Circle One) YES NO

TAX PAYER INFORMATION			
SSN	DOB	DOD	
NAME		EMAIL	
OCCUPATION	ARE YOU (Please Circle One)	A DEPENDENT	DISABLED BLIND
HOME PHONE	CELL PHONE		
IDENTIFICATION/DRIVER'S LICENSE NUMBER	STATE	ISSUE DATE	EXPIRATION DATE

ADDRESS INFORMATION		
STREET ADDRESS		
CITY	STATE	ZIP

FILING STATUS (Please Circle One)				
SINGLE	MARRIED FILING JOINTLY	MARRIED FILING SEPARATELY	HEAD OF HOUSEHOLD	WIDOW(ER)

SPOUSE INFORMATION			
SSN	DOB	DOD	
NAME		EMAIL	
OCCUPATION	ARE YOU (Please Circle One)	A DEPENDENT	DISABLED BLIND
HOME PHONE	CELL PHONE		
IDENTIFICATION/DRIVER'S LICENSE NUMBER	STATE	ISSUE DATE	EXPIRATION DATE

DEPENDENT(S) INFORMATION

	1 ST DEPENDENT	2 ND DEPENDENT	3 RD DEPENDENT	4 TH DEPENDENT
NAME				
DOB				
SSN				
NUMBER OF MONTHS LIVED WITH YOU				
DISABLED	YES NO	YES NO	YES NO	YES NO

DEDUCTIONS INFORMATION *(List The Amounts For All That Apply)*

STUDENT LOAN INTEREST	\$	HOME MORTGAGE INTEREST	\$	MOVING EXPENSES FOR ARMED FORCES	\$
COLLEGE TUITION/ FEES	\$	MEDICAL/DENTAL/VISION EXPENSES	\$	DONATIONS/ CONTRIBUTIONS	\$
CASUALTY LOSSES IN DISASTER AREAS	\$	EDUCATOR'S EXPENSESE	\$	GAMBLING LOSSES	\$

BANKING INFORMATION *(Complete Only If Requesting Direct Deposit)*

BANK		<i>(Please Circle One)</i> SAVINGS CHECKING	
ROUTING NUMBER		ACCOUNT NUMBER	

DISCLAIMER AND SIGNATURE *(List The Amounts For All That Apply)*

I/WE CERTIFY THAT MY/OUR ANSWERS ARE TRUE AND COMPLETE TO THE BEST OF OUR KNOWLEDGE.

TAXPAYER	DATE
SPOUSE	DATE



FILING STATUS QUESTIONNAIRE

1. DID YOU PAY MORE THAN HALF THE MORTGAGE/RENT, UTILITIES, FOOD, ETC. FOR THE HOUSEHOLD IN WHICH YOU AND YOUR CHILD/REN LIVED?

2. ARE YOU MARRIED BUT LIVING APART FROM YOUR SPOUSE?

3. ARE YOU STILL MARRIED AND DO YOU HAVE A LEGAL SEPARATION?

4. WHEN DID YOU MOVE INTO A SEPARATE HOME?

5. WILL YOU FILE A JOINT RETURN WITH YOUR SPOUSE?

6. CAN YOU PROVIDE DOCUMENTATION VERIFYING THAT YOU LIVED APART FROM YOUR SPOUSE (LEASE/MORTGAGE AGREEMENT, PROPERTY DEED, UTILITY BILL, ETC.) IF REQUESTED BY THE IRS?

7. CAN YOU PROVIDE DOCUMENTATION VERIFYING THAT YOU MAINTAINED MORE THAN HALF THE COST OF THE HOME (RENT RECEIPTS, PROPERTY TAX BILL, UTILITY BILL, GROCERY RECEIPTS, ETC.) IF REQUESTED BY THE IRS?

8. ADDITIONAL QUESTIONS (FOR TAX PREPARERS ONLY)

DISCLAIMER AND SIGNATURE *(List The Amounts For All That Apply)*

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TAXPAYER

DATE



EARNED INCOME TAX CREDIT QUESTIONNAIRE

The IRS continues to intensify its efforts to verify Earned Income Tax Credit (EIC) and the Additional Child Tax Credit claims and is holding tax preparers responsible for exercising "DUE DILIGENCE" in preparing such tax returns. Failure to make sufficient inquiries subjects a tax preparer to fines and penalties. Therefore, we will need the following information from you in order to claim a Earned Income Credit. **THIS INFORMATION IS REQUIRED. NO EXCEPTIONS.**

1. WITH WHOM DID YOUR CHILD/REN LIVE WITH?	
2. HOW MANY MONTHS OF THE YEAR DID YOUR CHILD/REN LIVE WITH YOU?	
3. HOW MANY BEDROOMS ARE IN THE HOME YOU & YOUR CHILD/REN RESIDE IN?	
4. HOW DID YOU PAY FOR YOUR MORTGAGE/RENT, UTILITIES, FOOD, ETC.?	
5. DID ANYONE PROVIDE FINANCIAL SUPPORT FOR YOUR OR YOUR CHILD/REN? YES NO	
6. WHO PROVIDED THE FINANCIAL SUPPORT?	HOW MUCH DID YOU RECEIVE?
7. DID YOU PAY CHILD SUPPORT? YES NO	HOW MUCH DID YOU PAY?

IF YOU ARE A SINGLE MALE WITH DEPENDENTS

1. WHERE WAS YOUR CHILD/REN'S MOTHER?	
2. WHY ISN'T THE MOTHER NOT CLAIMING YOUR CHILD/REN?	
3. WHO WATCHED YOUR CHILD/REN WHILE YOU WERE AT WORK?	
4. DID YOU HAVE DAYCARE EXPENSES? YES NO	HOW MUCH DID YOU PAY?

OTHER DEPENDENT QUESTIONS

1. IS THERE A RELEASE/REVOCATION OF RELEASE OF CLAIM TO EXEMPTION FOR CHILD/REN BY CUSTODIAL PARENT (IRS FORM 8332) IN EFFECT? YES NO			
2. DID YOU RECEIVE ANY GOVERNMENT FINANCIAL ASSISTANCE FOR YOUR CHILD/REN? YES NO			
IF SO, CIRCLE ALL THAT APPLY			
SOCIAL SECURITY BENEFITS	FOOD STAMPS	CASH BENEFITS	SECTION-8
3. IF CLAIMING A DISABLED DEPENDENT, WILL THE DISABILITY LAST FOR MORE THAN ONE YEAR? YES NO			
IF YES, PLEASE LIST THE TYPE OF DISABILITY YOUR DEPENDENT HAS: _____			
4. DID ANY OTHER ADULT LIVE IN THE SAME HOUSEHOLD AS YOUR CHILD/REN? YES NO			
IF SO, WHO?			
5. DID YOUR CHILD/REN ATTEND SCHOOL? YES NO			
6. DO YOU HAVE SCHOOL/DAYCARE RECORDS FOR EACH CHILD AS EVIDENCE OF ATTENDANCE FROM YOUR ADDRESS? YES NO			

7. IF NOT THE CHILD/REN'S BIOLOGICAL PARENT(S), ARE YOU BLOOD RELATED? YES NO
IF YES, HOW ARE YOU RELATED? _____

8. CAN A NONCUSTODIAL PARENT OR ANYONE ELSE CLAIM A CHILD TAX CREDIT FOR THE CHILD/REN? YES NO
IF YES, WHO? _____

9. THE AGE OF YOUR DEPENDENT IS INCONSISTENT WITH THE NORM, ARE YOU RELATED BY MARRIAGE? YES NO
IF NO, HOW ARE YOU RELATED TO YOUR DEPENDENT? _____

10. DID ANY OF YOUR DEPENDENT PROVIDE MORE THAN HALF OF HIS/HER OWN FINANCIAL SUPPORT? YES NO
IF SO, WHO DID? _____

11. ADDITIONAL QUESTIONS (FOR TAX PREPARERS ONLY)

Empty space for additional questions.

DISCLAIMER AND SIGNATURE (List The Amounts For All That Apply)

I/WE CERTIFY THAT MY/OUR ANSWERS ARE TRUE AND COMPLETE TO THE BEST OF OUR KNOWLEDGE.

TAXPAYER _____

DATE _____



SELF-EMPLOYED QUESTIONNAIRE

1. WHAT RECORDS DO YOU HAVE TO SUPPORT THE INCOME YOU RECEIVED FROM YOUR BUSINESS?

2. HOW MUCH DO YOU CHARGE FOR YOUR SERVICES?

3. HOW MANY CLIENTS DO YOU HAVE?

4. WHO MAINTAINS THE BUSINESS RECORDS FOR YOUR BUSINESS?

5. DO YOU HAVE SEPARATE BANKING ACCOUNTS FOR PERSONAL AND BUSINESS TRAFFICS?

6. HOW MANY HOURS PER WEEK DOES THE BUSINESS OPERATE?

7. ADDITIONAL QUESTIONS (FOR TAX PREPARERS ONLY)

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TAXPAYER

DATE



AMERICAN OPPORTUNITY TAX CREDIT QUESTIONNAIRE

The IRS continues to intensify its efforts to verify the American Opportunity Tax Credit (AOTC) claims and is holding tax preparers responsible for exercising "DUE DILIGENCE" in preparing such tax returns. Failure to make sufficient inquiries subjects a tax preparer to fines and penalties. Therefore, we will need the following information from you in order to claim a Earned Income Credit. **THIS INFORMATION IS REQUIRED, NO EXCEPTIONS.**

1. DID YOU RECEIVE A 1098-T FORM?

2. HOW MANY YEARS HAVE YOU (OR THE STUDENT) CLAIMED AN EDUCATION CREDIT, EITHER THE AOTC OR THE HOPE CREDIT, FOR THIS STUDENT?

3. HOW MANY ACADEMIC TERMS DID THE STUDENT ATTEND SCHOOL DURING THE TAX YEAR?

4. IS THE STUDENT AN UNDERGRADUATE?

5. IS THE STUDENT ENROLLED IN A PROGRAM THAT WILL RESULT IN A DEGREE OR ANOTHER PROFESSIONAL CREDENTIAL?

6. WHAT IS THE AMOUNT OF THE EDUCATIONAL EXPENSES PAID DURING THIS TAX YEAR?

7. DO YOU HAVE DOCUMENTATION TO SUPPORT THE EXPENSES PAID?

8. ADDITIONAL QUESTIONS (FOR TAX PREPARERS ONLY)

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TAXPAYER

DATE