BAER TAX GROUP

Personal Taxes
Annual Information-Tax Year 2020

	Taxpayer	Spouse
Full Name:	______________________	______________________
Social Security #:	______________________	______________________
Date of Birth:	______________________	______________________
Occupation:	______________________	______________________
Driver's License #:	______________________	______________________
Issue Date:	______________________	______________________
Expiration Date:	______________________	______________________
Document #:	______________________	______________________

(**NY only**- on the back of license- first 3 characters after the Doc# or after IDUSA on enhanced licenses)

Cell Phone #:	______________________	______________________
Email Address:	______________________	______________________

Current Address: ____

City: ______________________ State: ____________ Zip Code: ____________

Did you buy a new house or move in 2020? YES ☐ NO ☐ If yes, date of move or purchase: ____________

Prior address, city and state: ____

1st Economic Stim. Check- Spring 2020 Amt:__________ 2nd Economic Stim. Check- Jan/Feb 2021 Amt:_______

Direct Deposit for tax refunds: Checking ☐ Savings ☐ Name of Bank: ______________________

Routing Number (9 digits): ________________ Account Number: ______________________

How would you like to receive your tax return copy? (check at least one)

In Portal (PDF copy) ☐ Paper(by mail) ☐ Paper(office pick up) ☐

Would you like to review your return in the portal prior to e-filing? YES ☐ NO ☐

Your return is placed in the portal for review and you are notified. Payment for processing your tax return is due according to our payment terms. Your return is not e-filed until we receive confirmation from you.

Printed Name(s): ____

Signature(s): ______________________________ Date: ________________

Documents- Tax forms you receive. Check the boxes, include amounts, and submit documents for all that apply.
NEW CLIENTS ONLY include a copy of your prior year tax return ☐

For **Self-employed** or **Landlord** complete the separate Business or Rental Worksheet ☐ and Vehicle Expense Sheet ☐

W-2 Wages from employer ☐ # of forms___________ K-1 Business/Trust ☐ 1099 C- Debt cancel ☐

1095 A, B or C- Health Insurance ☐

1099 G- State Tax Refund ☐

1099 G- State Disability Income ☐

1099 G- Unemployment Wages ☐

SSA-1099- Social Security ☐

1099 R- Pension/Retirement Income ☐

1099 INT- Interest Income ☐

1099 DIV/ 1099B- Investments (all pages) ☐

1099 A – Property Abandonment ☐

1098- Mortgage Interest ☐

1098 T- Tuition statement ☐

1099 SA- Health Savings Account ☐

1099 Q- Education Payments ☐

1099 MISC- Miscellaneous Income ☐

NYS Property Tax Relief Check ☐

School, Property, Town/Village Tax Bills ☐

Dependents: Name, Birthdate, Soc. Sec # and relationship (child, parent, other): ________________________________

____

Volunteer First Responders- Taxpayer ☐ Spouse ☐ Name of station: ______________________________________

Are you a teacher/educator? Taxpayer ☐ Spouse ☐ Both ☐

Taxpayer plans to contribute before April 15th to an IRA? YES ☐ NO ☐
If yes, Traditional ☐ or Roth ☐ Amount: _________________________

Spouse plans to contribute before April 15th to an IRA? YES ☐ NO ☐
If yes, Traditional ☐ or Roth ☐ Amount: ________________________

Contribution Health Savings Plan (do not include amounts on W2: ____

Health Savings Plan amount withdrawn: ______________ Contribution to a 529 Education Plan: ______________

Alimony amount received: ________________________ Alimony amount paid: _____________________________

Moving expenses for Military persons: ____________________Long Term Care Premiums: _____________________

Health Insurance (do not include Medicare or employer paid ins.): ____

Medical Appt. miles driven: ______________________ Medical Rx, Copays: ___________________________

Donations by check or cash: _____________________ Value of non-cash donated items: ______________________

Miles driven for charity work: _____________ Electric Vehicle/ Motorcycle (include documents): ______________

Solar or Geothermal System (include documents): ____

Policies

Our process

Baer Tax Group, Inc. (BTG) are professionals and keep any information confidential and you are held in the highest regard. BTG requests the same in return. BTG only accepts a limited number of clients and our goal is for the relationship to be mutually beneficial and pleasant.

It generally takes 2-3 weeks from the time all your information is received in full to complete your return. Returns are not processed while you wait. It is very important be sure you have everything submitted for your tax preparation, refer to our checklists to be sure your information submitted is complete.

Phone calls and appointments are scheduled from our website, but information can be dropped off anytime, we have a secure outside drop box for after hours.

Complete information is needed by March 20 to file by the April 15 deadline. Returns that get placed on extension require complete information by September 10 to file by the October 15 deadline, there are no further extensions beyond this date.

Fees

Payment is due when your taxes are completed. You will receive an invoice upon completion and 3 days later it will be debited as per the payment form. BTG reserves the right to not process your return electronically until payment has been cleared.

The tax return fee covers the preparation of your tax return, it does not cover additional consulting/planning after the preparation, assistance with notices or contacting our office for a refund status. Instructions are given on how to check on refunds are on your instruction sheet. Refund processing can take time so please check with the IRS or State agency on your refund as per the instructions. BTG charges $25 fee to check your refund status.

Additional tax planning or consulting appointments or assistance with notices are welcome and can be set up from our website or by calling the office. The website has information about consulting fees.

Keep copies of your complete tax return, additional copies requested will incur a fee of $25 per year/per copy. Accessing our client portal on the BTG website will allow you access to your tax return copies anytime without fee.

Client Information

BTG does not audit the information you provide. Baer Tax Group, Inc will not prepare a return that has inaccurate income or expenses or is considered misstated in any way. There are strict guidelines for preparers and licensed CPA's and we must adhere to those guidelines and not jeopardize professional licensure under any circumstance.

Printed Name: ____

Signed: ______________________________ Date: ______________

BAER TAX GROUP

Payment Authorization Form

I/We hereby authorize Baer Tax Group, Inc to initiate debit entries to our account at the financial institution named below for the purpose of paying our fees for accounting and/or tax work.

Debits are processed upon completion of the work; an invoice will be sent. The debit will take place 3 days from invoice being sent, if the debit day falls on a holiday, the debit is processed the next business day.

I/We understand that if the funds are not available at the time of the transfer, we will receive notification from Baer Tax Group, Inc that the transfer could not be completed. I/We will then bring current the total amount due by making a credit card payment over the phone with 3% fee.

Further, I/we agree not to hold Baer Tax Group, Inc responsible for any delay or loss of funds due to incorrect or incomplete information supplied by me or by my financial institution.

This agreement will remain in effect until Baer Tax Group, Inc receives written notification of cancellation from me/us at the following email address office@baertaxgroup.com. The notice of cancellation must be received in such time and in such manner as to allow enough time for processing.

Name on bank account OR credit card: ____

Name of bank: ____

Account Type: ☐ Checking ☐ Savings

Routing number (9 digits): _________________________ Account number: __________________

Billing Zip Code on account: ______________________ Phone number: ____________________

OR

Credit card info: (will incur a 3% fee) Visa and Mastercard only.

Credit card #: ____

Expiration date: ____________________ Code from back of card (3 digits): __________________

Billing Zip Code on account: ______________________ Phone number: ____________________

Printed Name: ____

Signed: ____ Date: ____________________

Tax Return Engagement

Baer Tax Group, Inc. will prepare your federal and state income tax returns based on information you furnish to us. This engagement pertains to the 2020 tax year, and our responsibilities do not include preparation of any other tax returns due to any taxing authority.

It is your responsibility to provide all the information required for the preparation of complete, accurate and timely returns. We will furnish you with or you may access information, checklists and/or worksheets from our website as needed to guide you in gathering the necessary information. Your use of such forms will assist us in keeping our fee to a minimum and efficiently processing your data. To the extent we render any accounting and/or bookkeeping assistance, it will be limited to those tasks we deem necessary for preparation of the returns.

You represent that there is adequate substantiation to support deductions for any expenses claimed on the return. We will not audit or otherwise verify the data you submit to us, although we may ask you for clarification on information. You are ultimately responsible for the accuracy of your return and should review it carefully before approving/signing it**.** You should retain all the documents, canceled checks, and other data which form the basis of your reported income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority request.

If there is an error on the return resulting from incorrect information supplied by you, or due to your subsequent receipt of amended or corrected tax form(s) (W-2's, 1099's, K-1's), you are responsible for the payment of any additional taxes which would have been properly due on the original return(s), along with any interest and penalties charged by the IRS.

Your returns may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination, we will be available upon request to represent you and will render additional invoices for our time and expenses incurred.

Our fee for these services will be based upon the amount of time required at standard billing rates plus out-of-pocket expenses. All invoices are due and payable upon presentation. Tax returns are electronically filed or presented only after payment is received.

If the foregoing fairly sets forth your understanding, please sign below. However, if there are other tax return year you wish us to prepare, please inform us by noting so via email at **Office@baertaxgroup.com** and we will furnish you with an additional engagement letter.

Very truly yours,

Baer Tax Group, Inc.

Accepted By(print name): ____

Signed: ___________________________________ Date: ___________

BTG BAER TAX GROUP

Estimated Tax Payment tracking- 2020 tax year

Complete only if applicable

Due date:	Federal	State	Local
4/15/2020	Date paid: _______Amount: ________	Date paid: _____ Amount: _______ State:_____	Date paid: ______Amount: _____ ID____
6/15/2020	Date paid: _______Amount: ________	Date paid: _____ Amount: _______ State:_____	Date paid: ______Amount: _____ ID____
9/15/2020	Date paid: _______Amount: ________	Date paid: _____ Amount: _______ State:_____	Date paid: ______Amount: _____ ID____
1/15/2021	Date paid: _______Amount: ________	Date paid: _____ Amount: _______ State:_____	Date paid: ______Amount: _____ ID____

Remember DO NOT include any overpayments from prior years or payments made in current year that were for previous year.
DO NOT include any payments made in April for tax return EXTENSIONS. This payment would be with Federal form 4868 or the state form-for example- NYS IT370

Federal Tax-
Federal tax payments can be mailed with a check and the 1040-ES Vouchers included in your tax return.
You can print this form at the IRS.gov website. Each voucher has the mailing address where to send with instructions.
Pay online at https://www.irs.gov/payments. You can use your bank account or credit card.

State Tax-
State tax payments can be mailed with a check and the vouchers included in your tax return.
These forms can also be printed from the state tax department websites.

Your payments for the estimated income tax should be from a personal bank account or be paid with a personal credit card.

Keep track of your payments on the above worksheet. You will turn this in with the rest of your tax information to Baer Tax Group, Inc.