



Personal and Self-Employed Taxes: Annual Information-Tax Year 2022

Taxpayer

Spouse (if applicable)

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 move in 2022? YES NO If yes, date of move: _____

Previous address if you moved during 2022: _____

Did you maintain living quarters in New York City during 2022? YES NO

Did you buy/sell house in 2022? YES NO If yes, date(s) of purchase/sale: _____

Direct Deposit for any 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)

PDF in PORTAL (Separate Email address for EACH taxpayer required) No fee

Paper by MAIL(\$15) Paper Pick up in OFFICE(\$10)

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: _____

During 2022, did you receive, purchase, sell, exchange, or dispose of any virtual currency? Yes No

NEW CLIENTS ONLY include a copy of your prior year tax return and check this box:

For **Self-employed, Landlords or Farmers** complete the applicable Worksheet or portal Organizer and check this box:

Please review, check the boxes and submit documents that pertain to you below:

W-2 Wages from employer # of forms _____

K-1 for Business or Trust

1095A, B or C- Health Insurance

1099A- Property Abandonment

1099C- Debt Cancel

1099 G State Refund

1099 G State Disability

1099 G Unemployment Wages

SSA 1099 Social Security

1099 R Pension/Retirement Income

1099 DIV/1099B Investments (all pages)

1099 INT Interest Income

1099 MISC- Misc. Rent, or Royalties Income

1099 NEC -Self-Employ Income

1098T Tuition Statement

College Books/Supplies/Fees paid _____

1099Q Education Payments

1099 SA/5498 SA- Health Savings Account

School, Property, Town/Village Tax Bills

1098 Mortgage Interest

1099 S Sale of Real Property

Real Estate Closing Statement

Current or New Dependents: Name, Birthdate, Social Security Number, and relationship to taxpayer:

Remove dependent(s) claimed in the previous year? YES or NO Name(s) to remove:

Volunteer First Responders- Taxpayer Spouse Both Name of station: _____

Teacher or Educator during 2022? Taxpayer Spouse Both

IRA contributions TAXPAYER on or before April 15th? Traditional: \$ _____ Roth: \$ _____

IRA contributions SPOUSE on or before April 15th? Traditional: \$ _____ Roth: \$ _____

Long Term Care Premiums: _____ Health Insurance Premiums(not Medicare or employer paid): _____

Medical Rx/Copays: _____ Contribution to 529 Education Plan: _____

Medical Appt. miles driven: 1/1/22 to 6/30/22: _____ 7/1/22 to 12/31/22: _____

Miles driven for charity work all year: _____

Electric vehicle/Motorcycle (include receipt): _____ Solar/Geo- Thermal (include receipt): _____

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

Policies

Our process

Baer Tax Group, Inc. (BTG) are professionals, we keep all 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/worksheets to be sure your information submitted is complete.

Zoom, phone and in-person appointments are scheduled from our website. Information can be dropped off anytime, we have a secure outside drop box for after hours. Tax returns can be processed without an appointment.

Complete information is needed before **March 20th** to file by the April 15th deadline. Returns that get placed on extension require complete information before **September 10th** to file by the October 15th deadline, **there is only ONE extension.**

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 on how to check on refunds are on your instruction sheet and our website. Refund processing can take time so please check with the IRS or State agency on your refund as per the instructions. BTG charges a \$25 fee to check your refund status.

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

Keep copies of your complete tax return or download them to your computer from the portal. Additional copies requested will incur a fee of \$25 per year/per copy. Current clients are able to access tax return copies anytime in the secure portal. **Tax returns will not be emailed in order to ensure your sensitive information is kept confidential.**

Client Information

BTG does not audit the information you provide. BTG will not prepare a return that has inaccurate income or expenses or is considered misstated in any way. There are strict guidelines for tax professional and we must adhere to those guidelines and not jeopardize professional standing under any circumstance.

Printed Name: _____

Signed: _____ Date: _____

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.

Person/Business 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 **current 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, check lists 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 request additional 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 taxing authority.

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 services based on 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 years 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: _____



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TAX GROUP

Estimated Tax Payment tracking- 2022 tax year

Complete only if applicable

Due date:	Federal	State	Local
4/15/2022	Date paid: _____ Amount: _____	Date paid: _____ Amount: _____ State: _____	Date paid: _____ Amount: _____ ID _____
6/15/2022	Date paid: _____ Amount: _____	Date paid: _____ Amount: _____ State: _____	Date paid: _____ Amount: _____ ID _____
9/15/2022	Date paid: _____ Amount: _____	Date paid: _____ Amount: _____ State: _____	Date paid: _____ Amount: _____ ID _____
1/15/2023	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.