BAER TAX GROUP

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, accurateand 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: __________

BAER 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.