

CHILD CARE INFORMATION -

A CREDIT MAY BE AVAILABLE FOR EXPENSES PAID TO A DAYCARE, PRESCHOOL, OR CAMP FOR A CHILD UNDER THE AGE OF 13. IF SO, PLEASE PROVIDE THE FOLLOWING:

CHILD CARE PROVIDER NAME _____
FED ID OR SS # _____
ADDRESS _____
AMT PAID FOR YR _____ DEPENDENT NAME(S) _____

HIGHER EDUCATION INFORMATION -

A CREDIT MAY BE AVAILABLE FOR QUALIFIED EXPENSES PAID TO AN INSTITUTION OF HIGHER LEARNING - **PLEASE SUBMIT FORM 1098-T FOR EACH STUDENT**

FEDERAL & STATE QUARTERLY ESTIMATED PAYMENTS -

Please mark down the amount paid & when paid **if you make quarterly estimated payments:**

FED: _____
APRIL JUNE SEPT. JAN
STATE: _____
APRIL JUNE SEPT. JAN

2023 DEDUCTIONS

CHARITABLE DONATIONS

CASH \$ _____ NON-CASH (FAIR MARKET VALUE) \$ _____

UNREIMBURSED EMPLOYEE BUSINESS EXPENSES -

TAXPAYER AND SPOUSE-

LOCAL TRAVEL \$ _____ BUSINESS PUBLICATIONS \$ _____
UNION DUES \$ _____ TELEPHONE \$ _____
UNIFORMS \$ _____ OFFICE SUPPLIES \$ _____

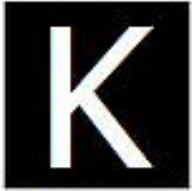
UNREIMBURSED MEDICAL EXPENSES

UNREIMBURSED MEDICAL EXPENSES INCURRED IN 2023 \$ _____

*****Please note that you must have adequate documentation to support the income & deductions listed on the tax return *****

Client Signature

Date



KAPLAN MANAGEMENT CONSULTANTS, INC
2023 PERSONAL INCOME TAX ENGAGEMENT LETTER

Dear Client,

This letter confirms the arrangement for the Income Tax Services that our firm will provide for your 2023 tax return. Our firm is responsible for the preparation of your income tax return based on the information that you have provided to our office. Our fees for the services outlined in this letter are based on the time required to properly prepare your tax return.

By signing this engagement letter, you are attesting to the following:

- 1) All information provided in the client questionnaire is correct.
- 2) We (I) have provided all documentation required to prepare the 2023 tax return.
- 3) We (I) acknowledge that all income (including cash, Venmo, PayPal, cryptocurrency, etc.) has been reported on the return.
- 4) We (I) acknowledge we have disclosed any foreign bank/brokerage accounts and cryptocurrency trades
- 5) We (I) understand that both the taxpayer and spouse are jointly and severally labile for any tax due.
- 6) We (I) are responsible for the tax return and payment of our (my) balance due to the IRS or State taxing authorities by the required due date.
- 7) All services must be paid in full before E-Filing or receipt of a taxpayer copy. There is a \$25 Bounced Check Fee.
- 8) We (I) understand that if requested by IRS or State, we (I) will produce receipts and documentation to substantiate income and deduction. I further understand that I should keep records of income and deductions for a minimum of seven (7) years.
- 9) We (I) understand that this engagement is limited to the preparation of applicable income tax returns and that there will be an additional fee for any work required after the filing of the tax return including, but not limited to, tax projections, tax notices, amended returns, etc.

Please be aware that our firm is not verifying the integrity of the data you provided or auditing any information that you may submit to us. Our firm has the right to engage third party contractors to perform the obligations of Kaplan Management under this agreement. Our firm is not responsible for any additional taxes or interest that you may owe. We are also not liable for any underpayment penalties or penalties that may be incurred due to the failure on your part to provide all of the information necessary to prepare and complete your tax return in an accurate and timely fashion.

By signing below, you are certifying the information contained in your client questionnaire (if utilized) and the completed tax return is based on the information that you have provided to our office through verbal or written communication (including fax and email). By signing, you are certifying that you have reviewed the information with your spouse (if married filing joint return) and you both agree to the information outlined in this engagement letter. Furthermore, you are certifying that you will be able to provide adequate documentation to support all income and deductions that you have provided to our office for the preparation of your return. Please note that by not signing this form but providing our firm with your signed electronic filing forms, or by mailing a hard copy of the tax return, you (and spouse if filing a married filing jointly return) are accepting and certifying the information outlined in this engagement letter.

Approved:

(Signature) _____ (Signature) _____

(Name) _____ (Name) _____

(Date) _____ (Date) _____