

# storenfinancial

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## *Welcome to Storen Financial!*

We are glad you chose us for your tax planning and preparation needs. As a family-run business with more than 50 years of experience, we strive to provide professional tax preparation in a welcoming setting and at a reasonable price. Our educated, personable staff is ready to help you navigate the process.

We want you to feel at ease. While you are here, please enjoy a hot cup of coffee, our public wifi and our children's play area. We know your time is precious, so we encourage you to securely upload, email, fax, mail or drop off this completed packet along with the requested supporting documents at least 2 weeks prior to your appointment.

Having this information in advance will allow us to serve you in the most efficient and effective manner possible.

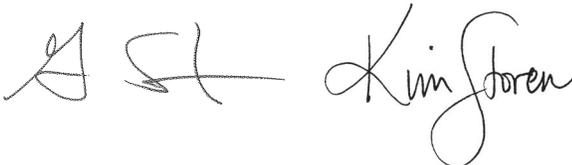
Our website has a wealth of information and resources for you. Look for up-to-date tax information on our blog, worksheets on how to value your goodwill donations, and links to help you track your refunds. To keep your documents accessible to you, we have a secure "Client Portal," accessible from our website, that allows you to retrieve your tax returns anytime once they are completed. We also offer a full range of small business services such as payroll, bookkeeping, audit representation and much more. We staff tax professionals with various specializations and designations, such as CPA, MBA and IRS Enrolled Agent, so we are ready and able to assist you any way we can.

Please contact us with your questions. We are here year-round to serve you!

Sincerely,

Greg Storen

Kim Storen



and your Storen Financial Team



### What should I provide for my personal tax return?

- Tax returns from the past 2 years if this is your first visit
- W2s
- 1099-R: Distributions from IRAs, Annuities, 401Ks
- 1099-INT, 1099DIV: Interest and dividend income
- 1099-B: Stock sales with cost basis
- 1098: Mortgage interest statement
- 1095: Proof of Health Insurance Coverage
- Property taxes paid
- Contributions to charities
- Business income, expense, and mileage (see separate checklist for S-Corp or partnership)
- Any additional income received (SSA 1099 - Social Security Form, W2G - gambling winnings, rent)
- Closing papers from home sale or purchase
- Closing papers from mortgage refinances
- Student loan interest paid
- Proof of college tuition paid (1098-T and bank statement, receipts of amount paid, canceled check, etc.)
- Proof of claimed dependents (ex. report card, doctor bill - must show name and address of dependent)
- Charity or medical mileage
- K-1s from corporations, investments, or partnerships

**filing status** – on the last day of the tax year I was:

- single**  
(can someone else claim you as a dependent?)
- married filing joint**  
(married at year end or lost spouse during year)
- head of house**  
(single or legally separated & supported a dependent)  
name of dependent: \_\_\_\_\_ ssn: \_\_\_\_ - \_\_\_\_ - \_\_\_\_\_
- married filing separate**  
(married at year end and not including spouse's income on return)
- qualifying window/er**  
(lost spouse within past two years and have dependent)
- unsure**

### taxpayer information

social security no. \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

first name & m.i. \_\_\_\_\_

last name \_\_\_\_\_

preferred name \_\_\_\_\_

occupation \_\_\_\_\_

d.o.b. \_\_\_\_ / \_\_\_\_ / \_\_\_\_

email \_\_\_\_\_

phone 1 (\_\_\_\_) \_\_\_\_\_  cell  home  work

phone 2 (\_\_\_\_) \_\_\_\_\_

address \_\_\_\_\_ apt \_\_\_\_\_

city \_\_\_\_\_ st \_\_\_\_\_ zip \_\_\_\_\_

county of residence 01/01/taxyear \_\_\_\_\_

county of employment 01/01/taxyear \_\_\_\_\_

### spouse information

social security no. \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

first name & m.i. \_\_\_\_\_

last name \_\_\_\_\_

preferred name \_\_\_\_\_

occupation \_\_\_\_\_

d.o.b. \_\_\_\_ / \_\_\_\_ / \_\_\_\_

email \_\_\_\_\_

phone 1 (\_\_\_\_) \_\_\_\_\_  cell  home  work

phone 2 (\_\_\_\_) \_\_\_\_\_

address \_\_\_\_\_ apt \_\_\_\_\_

city \_\_\_\_\_ st \_\_\_\_\_ zip \_\_\_\_\_

county of residence 01/01/taxyear \_\_\_\_\_

county of employment 01/01/taxyear \_\_\_\_\_

**preferred contact**  taxpayer  spouse **method**  email  phone  US mail

### dependent information

first name	last name	date of birth	ssn	relationship	lives with taxpayer (y/n)

### direct deposit information

checking bank name \_\_\_\_\_ acct no. \_\_\_\_\_

savings routing no. \_\_\_\_\_ **acct owner signature** \_\_\_\_\_

Client Name: \_\_\_\_\_

Yes No

- ... Did you change your bank account used for direct deposit?
- ... Did you receive an Identity Protection PIN (IP PIN) from the IRS?
- ... Were there any changes in dependents from the prior year?
- ... Did you pay for child care for your dependents?
- ... Did you start a new business or purchase rental property?
- ... Did you sell, exchange, or purchase any real estate?
- ... Did you sell, exchange, or purchase any assets used in your trade or business?
- ... Did you acquire or dispose of any stock or investment holdings?
- ... Did you refinance a principal residence or second home?
- ... Did you have any debts canceled or forgiven? (i.e. credit cards or student loans)
- ... Did you receive any income from property sold? (i.e. installment sale income)
- ... Did you receive any unemployment benefits?
- ... Did you receive any awards, prizes, hobby income, gambling or lottery winnings?
- ... Did you receive any Social Security benefits, including disability income?
- ... Did you withdrawal or contribute to: IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or retirement plan?
- ... Did you receive any payments from a pension, profit sharing or 401(k) plan?
- ... Did you, your spouse, or your dependents attend a post-secondary school?
- ... Did you withdrawal from or contribute to a 529 Plan?
- ... Did you pay any student loan interest?
- ... Did you make any contributions to a Health Savings Account (HSA)?
- ... Did you use your HSA for medical expense payment, reimbursement or personal use?
- ... Did you pay long-term care premiums for yourself or your family?
- ... Did you pay an individual as a household employee?
- ... Did you have a financial interest in or signature authority over a financial, bank, securities, or brokerage account located in a foreign country?
- ... Do you have any foreign financial accounts, foreign assets, or hold interest in a foreign entity?
- ... I am a citizen of the United States.
- ... I have lived in the United States for at least half of the tax year.

I agree that the above data is correct and have records to support the data furnished for the preparation of the tax return.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Client Name: \_\_\_\_\_

The StorenPlus program is a service you may enroll in to prevent any additional charges associated with your Storen Financial prepared tax return after the original filing of your return.

Our fees for post-filing representation are not included in the tax preparation fees. Charges for post-filing representation may arise from, but are not limited to:

- Amendment of your return
- Response to a letter received from a taxing agency (such as the IRS or the IN Department of Revenue)
- Audit representation
- Other situations that may arise after the original filing of the return

In the event you choose not to enroll in and post-filing representation is required, fees for representing you will be charged at our standard hourly rates plus expenses incurred for the services provided.

If post-filing representation is required as a result of an error made by Storen Financial, there will be no additional charges assessed. You will, however, be responsible for any additional taxes owed. Storen Financial will cover penalties and interest assessed as a result of the error. If at any time a fraud or criminal investigation begins we may withdraw from the engagement and recommend an attorney who specializes in such matters.

StorenPlus annual cost:

Personal Return .....	\$20
Personal with Schedule C (Small Business), E (Rental Property or K-1), F (Farm) .....	\$40
Individual with multiple security sales on Schedule D .....	\$40
Corporations and Partnerships .....	\$60

**yes**, I wish to participate in the StorenPlus program and acknowledge the cost of the program will be added to my tax preparation invoice.

**no**, I do not wish to participate and acknowledge that I will be billed an additional fee for all post-filing representation by Storen Financial.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Client Name: \_\_\_\_\_

Thank you for selecting Storen Financial to assist you with tax compliance. This letter confirms the terms of our engagement and the nature and extent of services we will provide.

We will prepare your federal, state, and local income tax returns with supporting schedules using information you provide to us. We will also perform a limited amount of bookkeeping and analysis necessary for preparation of the income tax returns. We may ask for clarification of some items, but we will not audit or otherwise verify the data you submit.

It is your responsibility to provide information required for preparation of complete and accurate returns. You should keep all documents, canceled checks and other data that support your reported income and expenses. They may be necessary to prove accuracy and completeness of the returns to a taxing authority. Management is responsible for proper recording of transactions in the accounts, safeguarding assets, and for the substantial accuracy of the financial records. Because you have final responsibility for the tax returns, you should review them carefully before you sign and file them.

We must use our judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. Pursuant to standards in IRS Circular 230 and IRC 6694, we are forbidden from signing a tax return unless we have a reasonable belief that a tax position taken on the return will have a "more likely than not" probability of being sustained on its merits. Under no circumstances may we sign a tax return with a tax position that has no reasonable basis. You agree to honor our decisions regarding disclosure of tax return positions to avoid or mitigate penalties. In the event you ask us to take a tax position that in our professional judgment will not meet the applicable laws and standards as promulgated, we reserve the right to stop work and shall not be liable to you for any damages that occur as a result of ceasing to render services. In addition, you will be liable for payment of any fee incurred to the date which service has ceased.

Currently the IRS and state taxing agencies are aggressive in assessing penalties. The law provides various penalties that may be imposed when taxpayers understate their tax liability. If any tax authority should later contest a position taken, there may be an assessment of additional tax plus interest and/or penalties. You acknowledge that any such understated tax, and any imposed interest and/or penalty thereon, are your responsibility, and that we assume no liability for any such additional assessments.

Our work is not intended to benefit or influence any third party, either to obtain credit or for any other purpose. We will not respond to or verify third party requests for any information reported on these tax returns. In addition, our engagement does not include any procedures designed to detect errors, fraud, or theft. Therefore, our engagement cannot be relied upon to disclose such matters.

Your returns may be selected for audit by a taxing authority or you may receive a letter from a taxing authority requesting additional information or supporting documentation. Any proposed adjustments are subject to certain appeal. Should your returns be selected for examination, we may be able to assist you upon request to represent you. Such representation would be a separate engagement, and we would render additional fees based upon the time and expenses required for resolution, unless you are enrolled in our Storen Plus Program. Ask your tax preparer for information.

Our fee for preparation of your tax returns described above will be based upon the amount of time required, the forms and schedules to be filed, as well as the complexity of the work to be performed. All invoices are due and payable upon presentation. In addition, this fee depends upon the timely delivery, availability, quality, and completeness of the information you provide to us.

We retain copies of the records you have supplied to us along with our work papers for your engagement for a period of three years. After three years, our work papers and engagement files may be destroyed. Your original records will be returned to you at the end of this engagement. Our work papers and files are not a substitute for your records, and you should arrange for secure storage of the originals.

To affirm that this letter correctly summarizes your understanding of the arrangements for this engagement, please sign the enclosed copy of this letter in the space indicated.

We appreciate your confidence in us.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_