

2023 TAX CHECKLIST & CONSENT

CURRENT CONTACT INFO

NAME

PHONE #

E-MAIL

UNEMPLOYMENT

I received unemployment payments in 2023.

Yes

No

CHILDCARE

I made payments to a childcare center or babysitter. I provided my tax preparer with an accurate end of the year statement or form W10.

Yes

No

N/A

FILING STATUS

I was unmarried on the last day of 2023..

Yes

No

I provided more than ½ of the cost to run my home.

Yes

No

DEPENDENTS

I am blood related to all of my dependent (s). My dependent (s) lived with me for 6+ months in 2023.

Yes

No

W2 FORMS

I have provided my tax preparer with ALL of my 2023 W2 forms. I am NOT expecting anymore W2s, even small dollar amount W2s.

Yes

No

401K WITHDRAWALS

I withdrew from my 401k account in 2023.

Yes

No

EDUCATION

I attended a college or university in 2023. I provided my tax preparer with my 1098-T form.

Yes

No

N/A

SMALL BUSINESS

I prepared my own business books & provided my tax preparer with an accurate P&L Statement. I have receipts that match all of my income & expenses.

Yes

No

N/A

CONSENT

All of my answers are true and I am responsible for any penalties for failing to report accurate information on my tax return.

NAME

SIGNATURE

TAX PREPARATION FEES

I understand I am responsible for paying my tax preparation fees to Indy Tax Queens.

Yes No

I understand my payment amount is..

<input type="checkbox"/>	Individual w/ out dependents - \$175
<input type="checkbox"/>	Individual w/ dependents - \$250
<input type="checkbox"/>	Individual w/ self-employment income - \$325

I understand that if I choose to receive a refund advance from Refund Advantage additional fees apply.

Yes No

I understand my payment is due on the date my Federal refund is deposited into my bank account. This date will be shown on the IRS website, Where's My Refund.

Yes No

I understand that if I do not pay my invoice by the due date that I am responsible for my tax preparation fee in additional to small claims court fees.

Yes No

NAME

SIGNATURE

