

# Yearly Tax Questionnaire

With On Demand Mobile Notary Services and Taxes

Tax Year \_\_\_\_\_

Full Name: \_\_\_\_\_ SS#: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Occupation: \_\_\_\_\_

Spouse/DP Name: \_\_\_\_\_ SSN#: \_\_\_\_\_

Spouse/DP Date of Birth: \_\_\_\_\_ Occupation: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

How did you hear about us? \_\_\_\_\_

Marital Status: Single Married Domestic Partnership Separated Divorced  
Widowed

Residence: Own Rent Tax Preparation Fee Paid Last Year: \$ \_\_\_\_\_

**Types of Income** (circle): Wages Commissions Unemployment Pension Social Security IRA  
Disability Self Employed Tips Interest Dividends Capital Gains/Stock Sales Royalties  
State Tax Refund Prize/Gambling Military or Reservist Income Other Rental Property  
K-1's

**Adjustments/Deductions** (circle): Estimated Tax Payments Mortgage Interest Property Tax  
Charitable Contributions Retirement Contributions IRA Contributions Adoption Expenses  
Student Loan Interest MSA/FSA Contributions Early Withdrawal Penalties Casualty or  
Theft Losses Non-Business Bad Debts Volunteer Expenses Prepaid Tuition Plan  
Contributions Child or Dependent Care Costs Medical/Dental Expenses Travel for Work  
Unreimbursed Work Expenses Union Dues Foreign Tax Payments Business Home Office  
Work Related Education Expenses Investment Expenses Safe Deposit Box Fees  
Presidential Declared Disaster Expenses Vehicle Registration Fees

**Questions:** write yes or no next to each number below

1. Did your marital status change during the tax year? If yes, have you changed your withholding at work?
2. Do you have any dependents you claim for tax purposes? If yes, complete the Dependent Questionnaire.
3. Were you claimed as a dependent by someone else?
4. Did everyone in your household have health insurance for the tax year? (form 1095)
5. Do you or your spouse plan to retire this year?
6. Are you or your spouse considered legally blind?
7. Do you have funds in a foreign account or a foreign trust?
8. Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of distribution?
9. Did you buy, sell or refinance your home or other property? If yes please submit the final closing statement.
10. Did you sell any stocks or bonds during the year?
11. Did you start a business?
12. Did you purchase a new vehicle or other large purchase during the tax year? If yes, how sales tax paid?
13. Did you or your spouse make gifts of over \$15,000 to anyone?
14. Did you pay any individual for domestic services where you were their only client?
15. Did you, your spouse or dependent attend post-secondary school? If yes, who?
16. Did you pay or collect alimony? What was the final date of your divorce? \_\_\_\_\_
17. Do you qualify for any energy credits (solar, vehicle, etc.)?
18. Did you use the proceeds from Series EE or US Savings Bonds purchased after 1989 to pay for higher education expenses?
19. Do you have records to support your expenses?
20. Do you expect your income & deductions to be the same next year?
21. Do you want refunds direct deposited? If yes, please include a voided check
22. Do you want to contribute to the Federal or State Election Funds?
23. Anything else that might affect your taxes?
24. Did you buy anything on the Internet and were not charged CA sales tax? If yes, what was the cost?
25. Did you acquire, sell or transact any Bitcoin or other Virtual Currency during the tax year?
26. Did you receive any PPP loan money in 2020? If so, how much and provide a list of expenses that were paid with the PPP money?

27. Did you receive any Economic Impact Payments (also known as Stimulus Relief Check) in 2019,2020 or 2021? If so, how much was each payment and what year was it received in?

Client Signature \_\_\_\_\_ Date \_\_\_\_\_

## Yearly Engagement Letter

### With On Demand Mobile Notary Services and Taxes

Thank you for choosing On Demand Mobile Notary Services and Taxes. We are pleased to have you as a client, and look forward to working with you for many years to come. This agreement confirms our understanding of the terms of our engagement and the nature and extent of the tax services that we will provide.

On Demand agrees to complete your federal and state income tax returns for the years for which you request our service. In preparing your returns, we rely on the information that you provide.

The Client agrees to provide On Demand with all necessary information to complete the returns, and acknowledges that it is the Client's responsibility to provide accurate and honest information to us; that On Demand will not provide audit or bookkeeping services; but will complete the returns based upon the information provided by the Client. The Client further represents that they can substantiate the information provided to On Demand with documentary evidence.

**With the Client's signature on the returns or form 8879, the Client is attesting to its accuracy, and the Client's responsibility for the returns.**

It is the Client's responsibility to retain all proof and documentation to substantiate any position taken with regard to the returns. In the event a return is selected by a taxing

authority for further review, On Demand, for an additional fee, will provide assistance to the Client in preparing for the review, but it is understood that On Demand cannot represent the Client before the taxing authority.

Should such a review result in an adjustment by the taxing authority, On Demand's liability is limited to penalties or interest due as a result of errors in completing the return, limited to and not to exceed the amount of fees paid to us for the return in question. Any penalties or interest due as a result of inaccurate, false, or unsubstantiated information provided to On Demand is the responsibility of the Client, as is any tax due under any circumstance.

Fees of our services are based on the annual fee schedule in effect at the time that the returns are prepared. Fees are due prior to the filing of your returns, but we reserve the right to request a retainer to be paid in advance of providing any services.

This engagement letter shall remain in effect for one calendar year from the signature date, or by notice from On Demand that we decline to continue providing tax preparation services to you.

Please indicate your agreement to the terms of this letter by signing and dating in the spaces provided below.

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date

**Privacy Disclosure Statement**

We collect nonpublic personal information about you through the information on the various documents and forms we receive from you. We restrict access to all client information to members of this firm who may use the information in providing you tax services. We do not disclose client information to anyone without your permission, unless required by law.