Rogers
TAX ADVISORY GROUP

PERSONAL DATA SHEET

843-552-5444

Please complete prior to your tax preparation appointment. (Includes Prior Clients)

	First Name and M.I.	Last Name	Social Security #
Taxpayer:			
Spouse:			

Street Address:		Apt No.:
City:		County:
State:		ZIP Code:
Telephone #:		How Did You Hear About Us?
E-mail address:		

	TAXPAYER		SPOUSE	
Occupation:				
Date of Birth:				
Blind:	☐ YES	☐ NO	☐ YES	☐ NO
$3 to Presidential Election Fund:	☐ YES	☐ NO	☐ YES	☐ NO
Did we prepare your return last year?	☐ YES	☐ NO	☐ YES	☐ NO

DEPENDENTS

First Name and M.I.	Last Name	S.S.#	Childcare Exps?	Relationship	D.O.B.
			☐ YES		
			☐ YES		
			☐ YES		

Filing Status ☐ **Single** ☐ **Head of Household** ☐ **Married Filing Jointly**
☐ **Qualifying Widower with dependent Child** ☐ **Married Filing Separate**

REMEMBER TO BRING THE FOLLOWING INFORMATION WITH YOU FOR TAX PREPARATION:

- ☐ Copy of last year's tax return (unless we prepared your return)
- ☐ 1099's from Interest Income, Dividend Income, Pension/Annuity Income and IRA distributions
- ☐ Statement of capital gain or loss transactions. (Sale price, Date of purchase, Number of shares, Date of sale proceeds)
- ☐ Copy of checks/record for quarterly estimated taxes paid
- ☐ Forms 1098 for Mortgage interest paid and Summarized TOTALS of any medical/dental expenses/charitable contrib.
- ☐ Property Tax receipts for Real Estate and personal property
- ☐ The HUD 1 statement from any real estate transactions (includes refinancing)
- ☐ Social Security Statements
- ☐ W2 forms for any employment
- ☐ 1099 NEC/MISC - Self Employment
- ☐ End of Year Brokerage/Mutual Fd Statement
- ☐ College tuition and student loan interest
- ☐ Any Health Insurance Forms 1095
- ☐ Stimulus payment(s) received in 2020:
- ☐ and 2021:
- ☐ **Anything received that states "IMPORTANT TAX INFO"**

TAX CLIENT AGREEMENT

Complete Tax Preparation for individuals for **$125.00** includes:
E -filed personal, single or joint, federal and one tax return for one tax year.

In order to complete these services, I have been asked to provide certain information. It is my responsibility to make sure the provided information is complete and accurate. The services do not include any verification of the information I provide. It is also my responsibility to maintain records of this information since I may need to satisfy tax authority inquiries.

***** IMPORTANT NOTE *****

If I bring in new or revised information (e.g., 1099's, W-2's, additional deductions or other tax information) after my taxes have been e-filed or printed to be filed by mail, I agree to pay Rogers Tax Advisory Group, Inc., an additional $75.00 to re-file or re-print my return(s).

My Tax Return will be filed electronically to allow faster processing by the IRS. My tax returns will not be electronically filed without my signed consent.

I understand the electronic filing process and will contact Rogers Tax Advisory Group should I have any questions or changes to my return.

Additional charges would include:

$ 75.00	Schedule C or E (each)
$ 40.00	Earned Income Credit (Schedule EIC)
$ 50.00	Additional State Return
$ 20.00	Additional copy of current year tax
$ 25.00	Additional copy of previous year tax return
$ 10.00	Copy of supporting documentation
$ 60.00	Form 8962 Reconciliation of the Premium Tax Credit

Business and Trust Returns – Negotiable

The estimated cost of my return will be ________________________

Client Signature: _______________________________

Print Name: ___________________________________ Date: ___________________

Client Signature: _______________________________

Print Name: ___________________________________ Date: ___________________