

Dear New Client,

This letter is to introduce you to **Accurate Tax Service**. Our philosophy is based on the belief that we are on our client's side, not the I.R.S.'s. Besides preparing your tax return with emphasis on customer service, efficiency and expertise, the following services are **included in your fee**:

1. **Electronic Filing.** By filling electronically you can speed up your refund and receive it in as little as ten days.
2. **Short inquiries.** We encourage clients to ask us questions during the year. (We always try to return calls within 48 hours and for short inquiries, there is no charge.) We have found that many clients overpay their taxes, something which could be avoided by a short phone call or visit. When you hear something from a so-called "expert", please call us and get the facts right. We would rather spend the time in off-season (when we have more time) than during the tax appointment when it is already too late. (We have found that the moaning takes longer than doing it right the first time!) If the question requires more time to discuss, calculate or research, we charge a consulting fee.
3. **Computerized returns.** We use one of the largest and most respected software companies in the U.S. This insures that your tax return is done as quickly and efficiently as possible.
4. **Handling of Letters** from the I.R.S. or Franchise Tax Board (as long as they are presented to us in a timely manner).
5. **Audit services.** Many personal audits can be handled at no charge. (We reserve the right to charge for audits based on the complexity or location.)
6. **Aspirin** for those rough tax times (limit two per client).

When you come in for your appointment, please **bring a copy of last year's tax return** as well as all W2's, 1099's, 1098's and any other income-related documents.

Thank you for your interest in **Accurate Tax Service**. We look forward to meeting you. If you have any questions regarding the above, please don't hesitate to contact us.

Sincerely,



Lisa Webster, Office Manager

Accurate Tax Service, Inc.

530-622-5546

support@accuratetaxservice.com

2025	1040	US	Miscellaneous Questions
If any of the following items pertain to you or your spouse for 2025, please check the appropriate box and provide additional information if necessary.			
Yes	No		
☐	☐		Did your marital status change during the year?
☐	☐		Did your address change during the year?
☐	☐		Could you be claimed as a dependent on another person's tax return?
☐	☐		Were there any changes in dependents? If a child was born during 2025, or you are claiming a child that you did not claim last year, please bring a social security card for the new dependent.
☐	☐		Did you receive IRS document Form 1095-A (Health Insurance Marketplace Statement), if so, please attach.
☐	☐		Did you buy or sell any stocks, bonds or other investment property? If so, please provide us with your brokerage statement in addition to any cost basis information you have available.
☐	☐		Did you have any qualified tips or overtime paid to you this year? If so, we will need some record that details the voluntary tips that you received for the year. The best place to begin for either of these figures will be your final paycheck stub for 2025.
☐	☐		Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? Please furnish your final settlement statement.
☐	☐		In the event you purchased a qualified automobile this year and financed it, we will need to get the VIN and the year end bank statement that shows the amount of interest paid on the vehicle for 2025.
☐	☐		Did you receive a distribution from a retirement plan (401(k), IRA, etc.)? Did you transfer or rollover any amount from one retirement plan to another retirement plan? If so, please provide a 1099-R.
☐	☐		Did you have any virtual currency transactions? If so, you will need to bring a 1099-DA form if available.
☐	☐		Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? Please provide us with information on books, required course materials and the 1098-T issued by the school for deductible tuition paid.
☐	☐		If you want direct deposit, is your account the same as last year? If you answer no to this answer, please provide a copy of the check (not deposit ticket) where you want your funds direct deposited.
☐	☐		May the IRS discuss your tax return with your preparer?

ORGANIZER

2025	1040	US	Tax Organizer
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Accurate Tax Service Inc
3350 Country Club Dr Suite 201
Cameron Park CA 95682
Telephone number: (530) 622-5546
Fax number: 530-622-8874
E-mail address: SUPPORT@ACCURATETAXSERVICE.COM

Tax Return Appointment
Date:
Time:
Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2025 tax return. Please enter all pertinent 2025 information.

NOTE: If you claim the earned income credit, please provide proof that your child is a resident of the United States. This proof is typically in the form of: school records or statement, landlord or property management statement, health care provider statement, medical records, child care provider records, placement agency statement, social service records or statement, place of worship, Indian tribal office statement, or employer statement.

NOTE: If your child is disabled, please provide one of the following forms of proof of disability: doctor statement, other health care provider statement, or social services agency or program statement.

CLIENT INFORMATION		
	Taxpayer	Spouse
First name and initial . . .		
Last name		
Title/suffix		
Social security number . . .		
Occupation		
Date of birth (m/d/y)		
Date of death (m/d/y)		
1=blind		
Home phone		
Work phone		
Work extension		
Cell phone		
E-mail address		
Address	In care of Street address Apartment number City State ZIP code	

DEPENDENTS		
	Dependent No.	Dependent No.
First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Date of death (m/d/y)		
Date of adoption (m/d/y) . . .		
Social security number . . .		
Relationship		
Months lived at home		
	Dependent No.	Dependent No.
First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Date of death (m/d/y)		
Date of adoption (m/d/y) . . .		
Social security number . . .		
Relationship		
Months lived at home		

2025

1040

US

Direct Deposit & Estimates (Form 1040 ES)

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Please enter all pertinent 2025 information.

DIRECT DEPOSIT / ELECTRONIC PAYMENT (3)

1=direct deposit of federal tax refund into bank account

1=electronic payment of balance due

1=electronic payment of estimated tax

BANK INFORMATION

Name of Bank	Percent to Deposit (xx.xx)	Routing Number	Account Number	Type of Account (Table 1)	Type of Invest. (Table 2)

Please bring all of your pertinent documents:

W-2	Wages, Salaries and Tips	1099-B	Stock Sales
1099-INT	Interest Income	1099-NEC	Self Employment
1099-DIV	Dividend Income	1099-MISC	Miscellaneous
1099-R	Pension or IRA	1099-SSA	Social Security
W-2G	Gambling Winnings	1099-S	Real Estate Sales

Please bring a copy of your last year's return

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