

INTAKE FORM INSTRUCTIONS - individuals

Please Read All Information

1. Tax Intake forms can be obtained at www.tedsmithcpa.com. Click on Resources - Tax Season Documents.
2. Engagement Letter - please read and if agree, sign. (must be signed and returned to us before we will start preparing return.
3. Individual Tax Organizer -
 - a. If existing client **Only need to Complete anything that has changed from last year**. If you think you will receive a refund and want direct deposit please complete information on bottom of first page.
 - b. If NEW CLIENT; complete all sections and questions. Mark NA to anything not applicable.
4. Health Care Organizer - If question 1 is YES and question 2 is NO, stop after question 2. If not, then complete the entire organizer.
5. Covers You Like a Blanket - Please read. This additional protection and services package will be added to your tax return fee, unless you notify us you want to OPT out. If you want the additional protection and services, do nothing and the cost of \$95 will be added to your invoice.
6. If you want a complete (detailed) organizer, please let us know and we will provide one.
7. Return the signed engagement letter and completed documents to our office with your tax documents. **WE WILL NOT start** on your tax return until all documents and needed tax documents are provided.
8. Your intake forms and tax documents may be returned to us via portal, fax 314-594-5980, mailing to PO Box 2021, Ozark, MO 65721 or drop off. If mailing, please email office@tedsmithcpa.com so that we can be watching for the information.

IMPORTANT INFORMATION

1. We will not e file your tax return until both the e-file signature form is signed and returned and we receive payment of our fees.
2. All tax information needed to prepare your return must be received by our office no later than March 16, 2018. Any information received after that date will result in the return being extended.
3. The filing deadline is April 17, 2018. All IRS or state amounts due are due by that date - otherwise penalties and interest will be charged on the amount owing.
4. Any returns requested or needing extended will incur additional extension fee of \$35.
5. An extension only extends the date for filling of the return. **IT DOES NOT extend the date for paying any amounts due.**

Appointment Related

6. Existing clients are welcome to make an appointment, but is not necessary. Dropping off information is preferred.
7. New clients we always want to have a set down appointment the first year.
8. We encourage, you to take advantage of our Exclusive 15 minute COMPLETE REVIEW once your return is completed.
9. Generally, returns are not completed on the spot. If this is a service you want, you must contact our office to check our availability to do this and make sure we allow enough time in the schedule. May incur additional fees.
10. Please let us know if you want to take advantage of our Tax Minimization Planning Service and we will schedule you an appointment for after tax season.