Brazen Business Services, LLC
13771 Millersburg Road SW Massillon, Ohio 44647
Call/Text: 330-474-9984 Email: team@brazenbusinessservices.com
www.brazenbusinessservices.com

Letter to Our Clients:

Our goal is to make filing taxes as easy as possible. We prefer all services to be done remotely and over the phone or via Zoom. If, however, you prefer in-person services, please let us know so we can make arrangements, an appointment fee may apply. You may also drop off required information at the address above during daylight hours using the available drop box.

We can file returns electronically to ensure timely filing. Please be aware that the Internal Revenue Service communicates through regular mail. They will never email you or call/text you regarding anything tax related. Any communications you receive from the IRS, we encourage you to let us know about.

Documents

Please use our secure portal to ensure your information is protected when sharing documents electronically. <u>You can access the Guest Exchange by going to brazen.securefilepro.com</u> If you are a returning client, you can use your unique sign-in to the portal from previous years.

This is the safest way to digitally share information. It is our policy to keep all information that we collect confidential and protected. If you choose to email or text information, please understand this is not safe or secure like the portal and there is no guarantee your information is private.

Once your return has been prepared signatures will be requested through the portal unless other arrangements are made. This is also where your tax return documents are stored for you to download for your records.

Terms of Payment

Our fees for this engagement are not contingent upon the results of our services. Payment in full is required prior to the return being prepared. <u>Tax returns will not be filed until all fees are paid.</u> We will always provide an estimate of charges when requested. We accept cash, check, and ACH payment. Late fees and interest may apply on past due accounts. If any collection action is required to collect unpaid balances due to us, you agree to reimburse us for our costs of collection, including attorney fees.

Service Agreement

By agreeing to services, you understand that we only provide information to those whom you authorize, to electronically file your return or as required by law to the IRS or other agencies. <u>Returns can only be prepared to the best of our ability when all information is shared openly and truthfully based on the facts and circumstances.</u> You have final responsibility for the income tax returns and must carefully review them before you sign them.

This service agreement specifically includes the preparation of your federal income tax return and your state income tax return. You are responsible for informing us if you have tax-filing obligations in additional municipalities or states. (continued pg.2)

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We will not audit or verify the data you submit, although we may ask for clarification or require additional documentation. You certify that the information you provide us with, either written (electronic) or verbal, can be substantiated by appropriate documentation.

We may terminate our representation of you if you fail to pay when due; if you insist that we pursue objectives that we consider imprudent, unprofessional, or unethical. If we elect to terminate our services our engagement will be deemed complete upon written notification of termination, even if we have not completed your returns.

Upon completion of your tax returns and the return of your records, if applicable, this engagement is complete. We are pleased to help you with future matters with an additional written engagement.

Finally, thank you for your trust!

C Weisgarber

Christine Weisgarber, Owner
Brazen Business Service LLC

Sign & date below in acknowledgement of the information above & return with your tax documents.

Signature: ______________________________________ Date: ___ - ___ - ___

Spouse: ____ Date: ___ - ___ - ___

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INTAKE INFORMATION

Taxpayer Information

Full Name: ____________________________

Date of Birth: ___-___-_______

Occupation: ____________________________

Email Address: _________________________

Phone: Work-___________________________

Cell-____________________________

Home-___________________________

Spouse Information

Full Name: ____________________________

Date of Birth: ___-___-______

Occupation: ____________________________

Email Address: _________________________

Phone: Work-___________________________

Cell-____________________________

Address: ____

INTAKE QUESTIONS (used to determine the cost to file your return and additional information to collect)

Do you have any earned income from overseas or foreign bank accounts or assets? Y /N

Did you have investment income in 2024? Y /N

Have you sold, exchanged, or used virtual currencies? Y /N

Have you made any retirement contributions for the year 2024? Y /N

Do you have Dependents, if so, how many? Y #__/ N; Can anyone else claim these dependents for 2024? Y /N

Do you own/operate a business, side hustle, or gig? Y /N; If yes did you earn income in multiple cities? Y /N

Do you have income from unemployment benefits, pensions, or gambling winnings? Y /N

Are there life changing circumstances in 2024 such as the birth of a child, marriage, or death? Y /N

Did you obtain health insurance through the marketplace/exchange (Obama Care)? Y /N

Do you have an HSA/FSA? Y /N

Do you, your spouse, or dependents have an IP Pin (identity protection pin)? Y/ N

Did you purchase a clean energy vehicle in 2024 or make energy-saving improvements to your home? Y /N

DOCUMENT CHECKLIST (on following page)
PLEASE BE PREPARED TO SUBMIT THE FOLLOWING INFORMATION IF IT APPLIES. The safest way to send us this information is via the secure portal at brazen.securefilepro.com.
You can also access the portal through www.BrazenBusinessServices.com!

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DOCUMENT CHECKLIST (Scanned or paper copies are best)

- Copies of 2 forms of ID, including Driver's License for each taxpayer. **We also need 2 IDs for each child for Earned Income Credit and the Child Tax Credit. One must be a social security card; others could be school records, health insurance, or birth certificate for example.**
- Copy of previous year's tax return (**only if not prepared by Brazen Business Services, LLC**)
- W-2 Forms(s) received from all employers. Include all copies.
- Forms 1099-NEC/K/Misc. for reporting income from interest, dividends, independent contractors, pensions, IRA's, 403B plans, tax refunds, HSA, FSA or MSA medical accounts, cancellation of debt, foreclosure, unemployment benefits, gambling winnings or annuities
- Form 1099-S and other documentation for the sale of property or home/s
- 1095-A/B/C for health insurance cover and premium tax payments
- Form(s) SSA-1099 or RRB-1099 for Social Security, SSI, or Railroad Retirement benefits
- Form 1099-B Tax reporting forms from brokerage firms, custodian, or mutual fund company, or other documents for reporting sales of stocks, mutual funds, or other assets.
- Form(s) 1098 for reporting mortgage interest, points, college tuition, student loan interest
- Schedule(s) K-1 for reporting partnership, estate and trust income and deductions
- Statement(s) of gambling winnings, prizes, awards, jury-duty pay, or hobby income
- HUD-1 or other closing statements if you bought, sold, or refinanced a home
- College account statement(s) showing the dates and amounts actually paid during the year
- Statement(s) showing the amount(s) of Veteran's Benefits or Worker's Compensation Benefits that you received during the year.
- Any letters from the IRS, State or Cities and other taxing agencies
- Documentation for childcare including the amount and tax ID of the provider
- Documentation for purchase of a clean energy vehicle or home improvements (call for details)
- For business owners:
  - Profit and Loss Report
  - Record of sales or purchases of assets
  - Mileage log (starting and ending odometer readings, dates, purpose of trip)

***If you have any questions, please reach out to us by email or phone*.**