STOP Intake Sheet

Stephens' Tax Office Pros
255 Kowaliga Rd., Eclectic, AL 36024

______________________________ I (We) understand that my taxes have been prepared using the information that I have provided to Angela Stephens. All of the statements made to her are true and correct to the best of my knowledge. When specific receipts were not presented, the information provided by me was as close to accurate as possible.

I further understand that Stephens' Tax Office Pros will not be held liable for information provided by me in the preparation of my tax return that is inaccurate.

I also understand that information furnished with the intent to defraud the Internal Revenue Service is punishable under federal and state statues by fine and possible imprisonment.

I also understand that Stephens' Tax Office Pros will not disclose any non-public personal information about our clients or former clients to anyone, except as permitted or required by law, or when necessary to process transactions requested by a client.

Stephens' Tax Office Pros restricts access to non-public personal information about you to members of our firm who need to know that information in order to provide professional services. We retain records relating to the professional services that we provide you in accordance with accounting and government standards. Stephens' Tax Office Pros employ physical, electronic, and procedural security safeguards to protect you no-public personal information.

Your confidence and trust are important to us. If you have any questions or concerns regarding the privacy of your non-public personal information, please feel free to ask Angela Stephens.

______________________________	______________________________
Tax Client (Signature)	Tax Client (Joint Return)(Signature)
______________________________	______________________________
Tax Preparer (Signature)	Date

STOP Intake Sheet

YOUR PERSONAL INFORMATION

Social Security Number	First Name	Middle Name(s)/Maiden Name	Last Name
Date of Birth (MM/DD/YYYY)	Job Title	Phone Number with Area Code	Cell Phone Number TEXT OK? ☐ Yes ☐ No

Mailing Address, City, State & ZIP Code

Email

This past year were you:

A full-time student? ☐ Yes ☐ No
Getting unemployment? ☐ Yes ☐ No
Paying dependent care expenses? ☐ Yes ☐ No

More questions:

United States citizen? ☐ Yes ☐ No
Can anyone else claim you on their tax return? ☐ Yes ☐ No ☐ Unsure
Did you have health insurance? ☐ Yes ☐ No

MARITAL STATUS / HOUSEHOLD INFORMATION AS OF 12/31/2020

☐ **Single**	This includes registered domestic partnerships, civil unions, or other formal relationships under state law.
☐ **Divorced**	Date of final decree:
☐ **Legally Separated**	Date of separate maintenance agreement:
☐ **Widowed**	Year of spouse's death:
☐ **Married**	Did you get married in 2020? Did you live with your spouse during any part of the last six months? ☐ Yes ☐ No

SPOUSE'S PERSONAL INFORMATION

Social Security Number	First Name	Middle Name(s)/Maiden Name	Last Name
Date of Birth (MM/DD/YYYY)	Job Title	Phone Number with Area Code	Cell Phone Number TEXT OK? ☐ Yes ☐ No

Mailing Address, City, State & ZIP Code

Email

This past year was spouse:

A full-time student? ☐ Yes ☐ No
Getting unemployment? ☐ Yes ☐ No
Paying dependent care expenses? ☐ Yes ☐ No

More questions:

United States citizen? ☐ Yes ☐ No
Can anyone else claim you on their tax return? ☐ Yes ☐ No ☐ Unsure
Did you have health insurance? ☐ Yes ☐ No

DEPENDENTS: OTHER THAN YOUR SPOUSE, LIST THE NAMES OF EVERYONE YOU PROVIDED MORE THAN 1/2 TOTAL SUPPORT WHO LIVED WITH YOU LAST YEAR.

Name as it appears on Social Security Card	Social Security Number	Date of Birth mm/dd/yyyy	Relationship (son, daughter, parent, etc.)	Months lived in your home in 2020	US Citizen	Single or Married as of 12/31/2020	Full Time Student	Totally & Permanently Disabled (IRS Form 524)?
					☐Y ☐N	☐S ☐M	☐Y ☐N	☐Y ☐N
					☐Y ☐N	☐S ☐M	☐Y ☐N	☐Y ☐N
					☐Y ☐N	☐S ☐M	☐Y ☐N	☐Y ☐N
					☐Y ☐N	☐S ☐M	☐Y ☐N	☐Y ☐N
					☐Y ☐N	☐S ☐M	☐Y ☐N	☐Y ☐N
					☐Y ☐N	☐S ☐M	☐Y ☐N	☐Y ☐N

NOTES:

Signature   Date   Spouse's (Signature)   Date

Please return this form along with all W2's, 1099's, Social Security Cards, photo ID, and other documentaion to the preparer.   **Form by: Geddie Images**

AUTHORIZATION OF SERVICES AND DISCLOSURES

- If eligible for an income tax refund, you may choose how you file your return and service and receive your refund.

- You may file your income tax return electronically without applying for an Electronic Refund Check (ERC), Freedom Advance or debit card and receive your refund directly from the IRS for free.

- You may direct the IRS or State to send your refund check to you or directly deposit your refund to an existing account without applying for an Electronic Refund Check (ERC) or debit card. The time it takes to get refund will be approximately the same with either an ERC, debit card or an electronically filed return with direct deposit by the IRS to an existing account.

My Signature below declares I have-

✓ been provided with clear explanations of the various ways of filing returns and the additional costs associated with each; including bank product options and disclosures.

✓ no knowledge of any unpaid prior year tax obligation; delinquent child support and/or alimony payments, student loans, V.A. Loans or other Federally sponsored loans.

✓ provided true and correct statements and information given to the tax preparer and employees to prepare my tax return are complete and accurate.

I promise to pay the Preparer fees and associated loans/charges regardless of whether a refund is issued by IRS.

______________________________	______________
Tax Payer (Signature)	Date
______________________________	______________
Spouse (Signature if applicable)	Date

AUTHORIZATION OF SERVICES AND DISCLOSURES
Part B - Disclosures

Client Mail in Tax Return

Client is responsible for payment of fees at time of service. Return is completed by preparer based upon information provided by taxpayer, printed out and mailed to IRS. Unless client's existing bank account information is listed on return the refund check will be mailed directly to the address on the return by the IRS. (There is no accurate way of determining the amount of time to receive a refund check due to the uncertainty of when the return is actually received and accepted by the IRS - you generally should expect the refund within 6 - 8 weeks)

Client Files Electronic Mailed/Direct Deposit

Client is responsible for payment of fees at time of service. Return is completed by preparer based upon information provided by taxpayer and then transmitted electronically to the IRS. You may elect to have the refund deposited directly into your existing checking or savings account or have a check mailed from the IRS to the address on the return. (Refer to IRS "Where's My Refund?" feature at www.irs.gov for information)

Bank Product Options

Fees are deducted from refund deposit amount. Return is completed by preparer based upon information provided by taxpayer and then transmitted electronically to the IRS. Refund is deposited into a direct deposit account established by the bank with the option to receive funds via one of the following methods:

- Electronic Refund Check (ERC): after deducting associated fees from deposited funds, the balance of refund is then issued by the bank through the tax office by printing a check. *Transmission fee involved. Additional Bank fee $_44.95_ for federal; $_.00_for state. See bank application for details.

- Refund Electronic Transfer (RET): after deducting associated fees from deposited funds, the balance of refund is deposited by the bank into the client's existing checking or savings account. *Transmission fee involved. Additional Bank fee $_44.95_ for federal; $_.00_ for state. See bank application for details.

Freedom Advance Feature

Additional bank product option; advance available with any disbursement method; Tier amounts for 2019 are: $1,000, $2,000*, $3,000* and $5,000*. Pre-Ack advance available January 2nd through 1st IRS acknowledgment. Regular advances proceeds received shortly after IRS acknowledgment for qualified taxpayers who have chosen bank product with advance feature. *1.5% of advance fee in addition to $ 44.95 service charge for federal deposit.

****Customer may elect to receive $1,000 Advance with no additional fee above $44.95 service charge for federal/state deposits.**