

# storenfinancial

Welcome to Storen Financial!

We are glad you selected us for your tax planning and preparation needs. As a family-run business with over 50 years of experience, we strive to provide professional tax preparation at a reasonable price—and in a welcoming setting. Our educated, personable staff is ready to help you navigate the process.

We want you to feel at ease. While you are here, please enjoy a hot cup of coffee and our public wifi. We know your time is precious, so we encourage you to upload, drop off, mail or fax the following documents at least 2 weeks prior to your appointment.

- Your tax returns from the last 2 years
- The new client information sheet
- Your supporting documents for the current return

Having this information in advance will allow us to serve you in the most efficient and effective manner possible. With CPAs, MBAs and IRS Enrolled Agents on staff we are ready to assist you any way we can.

Our website has a wealth of information and resources for you. Look for sheets on how to value your goodwill donations, links to help you track your refunds and up-to-date tax information on our blog.

Our team of financial advisors is here to advise you on comprehensive retirement and financial planning goals. We also offer a full range of business services from payroll to bookkeeping to audit representation and more.

Please contact us with your questions—we are here year-round to serve you!

Sincerely,



Greg Storen, MBA  
Owner, Financial Advisor, Senior Tax Professional



Kim Storen, EA  
Tax Team Lead, Senior Tax Professional

[www.storenfinancial.com](http://www.storenfinancial.com)

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### What should I provide for my personal tax return?

- ☐ Tax returns from the past 2 years (if this is your first visit)
- ☐ W2s
- ☐ 1099-INT, 1099 DIV: Interest and dividend income
- ☐ 1099-R: Distributions from IRAs, Annuities, 401Ks
- ☐ 1099-B: Stock sales with cost basis
- ☐ Additional income received (SAA 1099 - Social Security Form, W2G - gambling winnings, rent)
- ☐ 1098: Mortgage interest statement
- ☐ Property taxes paid
- ☐ 1095: Proof of Health Insurance Coverage
- ☐ Business income, expense, and mileage (*See separate checklist for S-Corp or partnership*)
- ☐ Student loan interest paid
- ☐ Proof of college tuition paid (*1098-T and bank statement, receipts of amount paid, cancelled checks, etc.*)
- ☐ K-1s from corporations, investments, or partnerships
- ☐ Total amount contributed to charities
- ☐ Charity or medical mileage
- ☐ Proof of claimed dependents (ex. report card doctor bill - must show name and address of dependent)
- ☐ Closing papers from home sale or purchase
- ☐ Closing papers from mortgage refinances

## filing status - on the last day of the tax year, I was:

- ☐ single  
(Can someone else claim me as a dependent?) ☐ yes ☐ no
- ☐ head of house  
(single or legally separated & supported a dependent)  
name of dependent \_\_\_\_\_ ssn# \_\_\_\_\_
- ☐ qualifying widow/er  
(lost spouse within past two years or have dependent)
- ☐ married, filing joint  
(married at year end or lost spouse during year)
- ☐ married, filing separate  
(married at year end and not including spouse's income on return)
- ☐ unsure

## taxpayer information

social security no. \_\_\_\_\_

first name & m.i. \_\_\_\_\_

last name \_\_\_\_\_

preferred name \_\_\_\_\_

occupation \_\_\_\_\_

d.o.b. \_\_\_\_\_ ☐ deceased  
(please include death certificate.)

email \_\_\_\_\_

phone 1 \_\_\_\_\_ ☐ cell ☐ home ☐ work

phone 2 \_\_\_\_\_ ☐ cell ☐ home ☐ work

address \_\_\_\_\_

city \_\_\_\_\_ state \_\_\_\_\_ zip \_\_\_\_\_

county of residence 01/01/tax year \_\_\_\_\_

county of employment 01/01/tax year \_\_\_\_\_

How did you hear about us? \_\_\_\_\_

## spouse information

social security no. \_\_\_\_\_

first name & m.i. \_\_\_\_\_

last name \_\_\_\_\_

preferred name \_\_\_\_\_

occupation \_\_\_\_\_

d.o.b. \_\_\_\_\_ ☐ deceased  
(please include death certificate.)

email \_\_\_\_\_

phone 1 \_\_\_\_\_ ☐ cell ☐ home ☐ work

phone 2 \_\_\_\_\_ ☐ cell ☐ home ☐ work

address (if not same as taxpayer) \_\_\_\_\_

city \_\_\_\_\_ state \_\_\_\_\_ zip \_\_\_\_\_

county of residence 01/01/tax year \_\_\_\_\_

county of employment 01/01/tax year \_\_\_\_\_

preferred contact ☐ taxpayer ☐ spouse method ☐ email ☐ phone ☐ US mail ☐ text

## dependent information

first name	last name	date of birth	ssn	relationship	lives with taxpayer
_____	_____	_____	_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	_____	_____	_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	_____	_____	_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	_____	_____	_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	_____	_____	_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	_____	_____	_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no

## direct deposit information

☐ checking bank name \_\_\_\_\_ acct no. \_\_\_\_\_

☐ savings routing no. \_\_\_\_\_ acct owner signature \_\_\_\_\_

**yes no Lifestyle**

- ☐ ☐ Did you change your bank account used for direct deposit?
- ☐ ☐ Did you move during the year? (Change county, change states)
- ☐ ☐ Did you change jobs during the year?
- ☐ ☐ Were there any changes in dependents from the prior year?
- ☐ ☐ Did you start a new business or purchase rental property?
- ☐ ☐ Did you contribute to a retirement plan? i.e. IRA, Roth, Keogh, SIMPLE, SEP, 401(k)

**yes no Income**

- ☐ ☐ Did you receive any unemployment benefits?
- ☐ ☐ Did you receive any awards, prizes, hobby income, gambling or lottery winnings?
- ☐ ☐ Did you receive any Social Security benefits, including disability income?
- ☐ ☐ Did you receive any income from property sold? (*i.e. installment sale income*)
- ☐ ☐ Did you have any debts canceled or forgiven? (*i.e. credit cards or student loans*)
- ☐ ☐ Did you sell, exchange, or purchase any real estate?
- ☐ ☐ Did you receive any payments from a retirement plan? i.e. pension, IRA or 401(k) plan?

**yes no Dependents/Children**

- ☐ ☐ Did you pay for child care for your dependents?
- ☐ ☐ Did you pay any student loan interest?
- ☐ ☐ Did you withdraw from or contribute to a 529 Plan?
- ☐ ☐ Did you have a dependent in college during the year?

**yes no Medical**

- ☐ ☐ Did you make any contributions to a Health Savings Account (*HSA*) ?
- ☐ ☐ Did you pay long-term care premiums for yourself or your family?
- ☐ ☐ Did you use your HSA for medical expense payment, reimbursement or personal use?

**yes no IRS Required**

- ☐ ☐ Did you have a financial interest in or signature authority over a financial, bank, securities, or brokerage account located in a foreign country?
- ☐ ☐ Do you have any foreign financial accounts, foreign assets, or hold interest in a foreign entity?
- ☐ ☐ Cryptocurrency: At any time during the year, did you receive, sell, send, exchange or otherwise acquire any financial interest in any virtual currency?
- ☐ ☐ How much did you receive for the stimulus payment? 1st \_\_\_\_\_ 2nd \_\_\_\_\_
- ☐ ☐ Did you receive EIDL or PPP money?
- ☐ ☐ Did you receive an Identity Protection PIN (*IP PIN*) from the IRS?

client name \_\_\_\_\_ date \_\_\_\_\_

name(s) on tax return \_\_\_\_\_

year of return \_\_\_\_\_

Thank you for selecting Storen Financial Group to assist you with tax compliance. This letter confirms the terms of our engagement and the nature and extent of services we will provide.

We will prepare your federal, state, and local income tax returns with supporting schedules using information you provide to us. We will also perform a limited amount of bookkeeping and analysis necessary for preparation of the income tax returns. We may ask for clarification of some items, but we will not audit or otherwise verify the data you submit.

It is your responsibility to provide information required for preparation of complete and accurate returns. You should keep all documents, canceled checks and other data that support your reported income and expenses. They may be necessary to prove accuracy and completeness of the returns to a taxing authority. Management is responsible for proper recording of transactions in the accounts, safeguarding assets, and for the substantial accuracy of the financial records. Because you have final responsibility for the tax returns, you should review them carefully before you sign and file them.

We must use our judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. Pursuant to standards in IRS Circular 230 and IRC 6694, we are forbidden from signing a tax return unless we have a reasonable belief that a tax position taken on the return will have a "more likely than not" probability of being sustained on its merits. Under no circumstances may we sign a tax return with a tax position that has no reasonable basis. You agree to honor our decisions regarding disclosure of tax return positions to avoid or mitigate penalties. In the event you ask us to take a tax position that in our professional judgment will not meet the applicable laws and standards as promulgated, we reserve the right to stop work and shall not be liable to you for any damages that occur as a result of ceasing to render services. In addition, you will be liable for payment of any fee incurred to the date which service has ceased.

Currently the IRS and state taxing agencies are aggressive in assessing penalties. The law provides various penalties that may be imposed when taxpayers understate their tax liability. If any tax authority should later contest a position taken, there may be an assessment of additional tax plus interest and/or penalties. You acknowledge that any such understated tax, and any imposed interest and/or penalty thereon, are your responsibility, and that we assume no liability for any such additional assessments.

Our work is not intended to benefit or influence any third party, either to obtain credit or for any other purpose. We will not respond to or verify third party requests for any information reported on these tax returns. In addition, our engagement does not include any procedures designed to detect errors, fraud, or theft. Therefore, our engagement cannot be relied upon to disclose such matters.

Your returns may be selected for audit by a taxing authority or you may receive a letter from a taxing authority requesting additional information or supporting documentation. Any proposed adjustments are subject to certain appeal. Should your returns be selected for examination, we may be able to assist you upon request to represent you. Such representation would be a separate engagement, and we would render additional fees based upon the time and expenses required for resolution, unless you are enrolled in our Storen Plus Program. Ask your tax preparer for information.

Our fee for preparation of your tax returns described above will be based upon the amount of time required, the forms and schedules to be filed, as well as the complexity of the work to be performed. All invoices are due and payable upon presentation. In addition, this fee depends upon the timely delivery, availability, quality, and completeness of the information you provide to us.

We retain copies of the records you have supplied to us along with our work papers for your engagement for a period of three years. After three years, our work papers and engagement files may be destroyed. Your original records will be returned to you at the end of this engagement. Our work papers and files are not a substitute for your records, and you should arrange for secure storage of the originals.

To affirm that this letter correctly summarizes your understanding of the arrangements for this engagement, please sign the enclosed copy of this letter in the space indicated.

We appreciate your confidence in us.

Storen Financial Group

signature \_\_\_\_\_

date \_\_\_\_\_