



## Tax Preparation Main Information Sheet

**Personal Info: (Please Print)**

Taxpayer First Name: \_\_\_\_\_ MI: \_\_\_\_ Last Name: \_\_\_\_\_

SSN: \_\_\_\_\_ DOB: \_\_\_\_\_ Email: \_\_\_\_\_

Spouse First Name: \_\_\_\_\_ MI: \_\_\_\_ Last Name: \_\_\_\_\_

SSN: \_\_\_\_\_ DOB: \_\_\_\_\_ Email: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

### Dependent Information

Name (First & Last)	DOB	Social Security #	Relationship	Months lived with you	Full-Time Student	Total Disabled

1. Did you provide more than half of the support for the dependents listed above? YES or NO
2. Have you ever had Earned Income (EIC) disallowed by the IRS? YES or NO
3. Would you like for your refund to be direct deposited into your bank account? If yes....
4. Routing Number \_\_\_\_\_ Account # \_\_\_\_\_
5. How did you hear about Renew You Tax Service? (Person's Name) \_\_\_\_\_
6. Did you receive insurance through the Marketplace / Obamacare?
7. YES or NO ..... If YES, please include your 1095A Healthcare Form.
8. 10. Are you in need of Credit Repair Services? YES or NO
9. 11. Are you in need of Final Expense and/or Life Insurance Policy? YES or NO
10. Please sign this document stating the information above is correct to the best of your knowledge:
11. Your Signature: \_\_\_\_\_ Spouse Signature: \_\_\_\_\_



## **Disclosure Sheet**

By signing this document, I acknowledge that all information in my 2023 federal and state tax return that include, but not limited to my earned and unearned income, expenses, deductions, dependents, and other information is true and accurate to my knowledge. This letter will serve as our agreement in this matter, and we ask that you carefully review the letter and sign to confirm all the information contained within.

It is your responsibility to provide us with all the information needed to prepare complete and accurate tax returns. We will not or otherwise verify the data you submit, although we might ask you to clarify some of the data. If you supply us verbally with any tax information, by signing this letter you are confirming that the information provided is true and correct to the best of your knowledge.

I understand that this information is being provided to the IRS and State Revenue. I have been advised by my tax preparer that any false and misleading information that I provide for income tax filing purposes is against the law and are subject to penalties. I understand that Renew You Tax Service is only liable for any Error and Omission on their part and will be responsible for any interest and penalties and not tax due.

As you know, tax returns are subject to examination by various taxing authorities at both the state and federal levels. In the event of an examination or audit, you may be requested to produce supporting documents or records to substantiate the items of income or deductions. If an examination or audit does take place, Renew You Tax Service stands ready to work with you.

By signing this letter, you authorize us to communicate with you regarding all products which we offer via phone, email, fax, and/or letter format. If you choose not to be contacted, please call us at (803) 548-3008. None of your information will be sold to anyone else.

If the terms outlined in this letter are agreeable to you, please sign a copy of the letter.

We appreciate the opportunity to be of service to you and look forward to working with you and on your behalf. If you should have any questions or need additional information, please do not hesitate to call.

Sincerely,

Accepted:

\_\_\_\_\_  
Taxpayer

\_\_\_\_\_  
Spouse

\_\_\_\_\_  
Date

### **Acknowledgement of Return**

\_\_\_\_\_ I have received a copy of my 2021 tax return. I understand that I will have to pay a **\$35.00 fee for any additional copies.**



## Limited & Temporary Power of Attorney

I \_\_\_\_\_ (Name) and  
\_\_\_\_\_ hereby give authorization to  
\_\_\_\_\_ (Tax Preparer) at Renew You Tax Service to  
prepare, sign, and electronically file my federal and state income tax return elected to be  
filed by me under the Internal & State Revenue code for taxable year 2023. I acknowledge  
that the preparer, who prepared my return, discussed with me the return, asked me  
questions that related to my tax issue, and discussed all fees to include tax preparation fees,  
bank, and administration fees. I give Renew You Tax Service permission to apply for the  
bank product that I choose, per our discussion before the return is submitted to the IRS.  
Renew You Tax Service has agreed not to submit my tax return until I give them permission  
either by oral or email from my email listed below and last 4 digits of my social security  
number to submit.

\_\_\_\_\_  
Name (Please Print)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Spouse Signature

Taxpayer Email: \_\_\_\_\_

Spouse Email: \_\_\_\_\_

**Office Use Only:**  
\_\_\_\_\_

Preparer: \_\_\_\_\_ Date Received: \_\_\_\_\_

Preparer PTIN: \_\_\_\_\_



## **Acknowledgment to Pay**

I \_\_\_\_\_ request that my tax preparation fee for filing my 2023 Taxes be deducted from my anticipated Tax Refund.

I understand and agree if by any chance that my refund is taken by the IRS (or any other Financial Institution) I will be notified by ReNew You Tax Service to clear up my outstanding tax preparation fee.

I understand and agree that I will be taking full responsibility of my tax preparation debt and pay all fees acclimated for all services rendered.

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date

