Clear Form

Accounting Services of York LLC

2026 TAX YEAR
CLIENT INFORMATION
Items in BOLD are Required

3030 E. Market St • York, PA 17402
(717) 757-5482 · TEXT (717) 759-4227
"We'll count the beans, you enjoy the coffee."

ALL RETURNS WILL BE DELIVERED DIGITALLY IN SMARTVAULT UNLESS THIS BOX IS CHECKED. ☐ Hard copy

Your Personal Information (if filing a joint return, enter the primary taxpayer's name first)

Taxpayer Name: _____ Spouse Name: _____

Your SSN: _____ Spouse SSN: _____

Your Daytime Phone: _____ Spouse Daytime Phone: _____

Your Email: _____ Spouse Email: _____

Your Occupation: _____ Spouse's Occupation: _____

Your Date of Birth: _____ Spouse's Date of Birth: _____

Did the IRS issue you a PIN: ☐ Yes ☐ No Did the IRS issue Spouse a PIN: ☐ Yes ☐ No

If YES, date: _____ PIN #: _____ If YES, date: _____ PIN #: _____

Have you moved in the last 12 months? ☐ Yes ☐ No Date Moved: _____

Current Mailing Address: _____

City: _____ **State:** _____ **ZIP:** _____ **County**: _____

Marital status as of December 31, 2026:

☐ Single ☐ Married ☐ Divorced ☐ Widowed ☐ Legally separated ☐ HOH

Changes during 2026	**Yes**	**No**	**Date**
Did you get married?	☐	☐	
Did your spouse pass away?	☐	☐	
Did you become legally separated?	☐	☐	
Did you get divorced?	☐	☐	
Did you pay more than half the cost of keeping up your home during 2026?	☐	☐	

List below the dependents you are CLAIMING on your tax return:

Does your dependent have an IRS Identity Protection PIN (IP PIN)?
List PIN below. ☐ Yes ☐ No

First *and* Last Name	**Date of Birth**	**Social Security Number**	**IP PIN**	**Relation** S = son D = dau. O = other	**Number of months** living in your home	Did you provide more than 50% of their support **YES or NO**

Treasury Department NO LONGER mails refund checks. A bank account is required (or cash app, etc)

Name of Bank or Financial Institution: _____ ☐ Checking ☐ Savings

Routing Number: _____ Account Number: _____

New Clients will be asked to pay a $100 retainer for our services.

If you are required to pay in, which method do you prefer? ☐ Mail Physical Check or ☐ Pay Electronically Online (ASY default is April 12th).

Did you pay any Federal, State, or Local quarterly Estimated Taxes?

	Federal	State	Local
1st Quarter			
2nd Quarter			
3rd Quarter			
4th Quarter			
TOTAL			

Check the box for each of the following questions answered YES, and follow instructions per question.

☐ **Did you pay or receive** alimony or separate maintenance payments from agreements entered into prior to 2019?

If YES, recipient's Name: _____ SSN: _____ Amount: _____

☐ **Did you purchase and install** energy-efficient home items (such as windows, doors, furnace, heat pump, solar, "clean" vehicle, etc.) in 2026? If YES, provide Proof of Purchase, Date Purchased, and Amount Paid, for each item. **QMID code required.**

☐ **Did a lender cancel any of your debt** during 2026? (i.e. credit card or mortgage). If YES, include any Forms 1099-A or 1099-C.

☐ Do you have a **Health Savings Account (HSA)**? If YES, include forms 5498-SA, 1099-SA, and enter any personal contributions to the account during 2026 here (NOT employer's contributions): _____

☐ Did you have **Health Insurance through the Marketplace** (healthcare.gov or Pennie) or receive any advance premium credit? If YES, please include your 1095-A.

☐ Did you have **Child or Dependent Care expenses**, such as daycare? If YES, please **provide a statement** from the provider with the Provider's Name, Identification Number (FEIN or SSN), and the Amount Paid.

☐ Are any of your dependents claiming themselves on their tax return? If YES, who? _____

☐ Did you contribute to a 529 College Savings Plan? If YES, provide amount paid in 2026 for each child:

Name & Amount: _____ Name & Amount: _____

If you have a dependent under the age of 17, please answer the following questions for the Child Tax Credit.

Does any dependent have a Trump Account, or were contributions made to one during 2026? If yes, provide account statements and contribution details.	☐ Yes	☐ No
Did the child live with you for more than half of 2026?	☐ Yes	☐ No
Is the child your son or daughter?	☐ Yes	☐ No
Can anyone else claim the child as their dependent? If yes, who? _____	☐ Yes	☐ No
Have you permitted someone else to claim this child for 2026? If yes, include Form 8332.	☐ Yes	☐ No
Did the child provide over half of his or her own support?	☐ Yes	☐ No
Can YOU be claimed as a dependent on someone else's Federal Tax Return?	☐ Yes	☐ No

If you or a dependent attended college in 2026, answer the following questions and include the 1098-T statement.

Did you or the dependent student **pay any qualified education expenses?** If YES, were any expenses shown on the 1098-T reimbursed to you through a scholarship grant, VA Benefit, or employer assistance? If YES, how much? $ _____

If the student withdrew from classes, did they receive a refund of educational expenses? If Yes, how much? $ _____

Has the student or parents **claimed the American Opportunity Tax Credit** in a prior tax year? If YES, how many years? _____

If you are 65 or older, for PA Rent/Property Tax Rebate, include/attach your tax bills or rent certificate.

Do you ☐ Rent or ☐ Own? What is your monthly rent? $ _____

Additional Information

	Yes	No
Do you have a K-1 from an S corporation or partnership? If yes, request the Form 1116 documentation.	☐ Yes	☐ No
Did you buy or sell any cryptocurrency? If yes, include Form 1099-B or a spreadsheet/report detailing the transactions.	☐ Yes	☐ No
Did you have any gambling winnings? If yes, include your Form W-2G.	☐ Yes	☐ No
Did you work overtime or receive tips? If yes, include your last paystub(s) for the year.	☐ Yes	☐ No
Are your records on a thumb drive?	☐ Yes	☐ No

If yes, password: _____

Which states are you required to file in? Please list: _____

_____

If you have rental property outside Pennsylvania, list the state above.

Are you claiming the new auto loan deduction? ☐ Yes ☐ No

If yes, we must have the VIN number for the vehicle. Include the interest statement.
The vehicle must be new to you and assembled in the US.

Business, rental property, and notice-response questions

Additional fee required for these services

Do you need to file mercantile tax or obtain a local business license?	☐ Yes	☐ No
Do you need to file a business annual report?	☐ Yes	☐ No
Would you like ASY to respond to IRS or state letters? Provide all pages.	☐ Yes	☐ No
Do you want ASY to monitor your IRS account year-round? Annual fee required.	☐ Yes	☐ No
Do you want annual tax planning? Annual fee required.	☐ Yes	☐ No

Do you have employees? W-3 is required.	☐ Yes	☐ No
Did you sell rental property? If yes, provide the closing documents.	☐ Yes	☐ No
If self-employed, did you purchase new equipment? Provide purchase records. Or use the ASY expense spreadsheet.	☐ Yes	☐ No

If you have a business, provide your IRS EIN assignment letter. ASY will need it.

Claiming vehicle mileage? Enter the vehicle make and model:

_____

Please provide a copy of last year's return if ASY did not prepare it. Thank you!

Accounting Services of York, LLC
Tax Preparation Engagement Agreement

Tax year(s): _____ Client name(s): _____

Thank you for choosing Accounting Services of York, LLC (ASY). This agreement explains the tax preparation services we will provide, your responsibilities, and our fees. Services are limited to the taxpayers, tax years, and returns identified above and any additional services accepted by ASY in writing.

1. Scope of services

ASY will prepare the specified income tax returns using information you provide and applicable tax law. Preparation of your individual return may include related business or rental schedules; it does not include a separate entity's return unless specifically listed above.

This engagement does not include an audit, review, or other assurance service. We do not undertake to detect fraud, theft, or all errors. We may rely on information you provide without auditing it, but will make inquiries and request supporting documentation when required by law or professional standards or when information appears incomplete, inconsistent, or incorrect. We may decline to prepare or file a return if concerns cannot be resolved or a requested position cannot be supported.

Unless separately agreed in writing, services do not include bookkeeping or account reconciliation; payroll or sales tax filings; business registrations or licenses; prior-year or amended returns; ongoing tax planning or estimated-payment monitoring; transcript retrieval; responding to notices; audits, appeals, collections, or representation before a tax agency. A power of attorney alone does not engage ASY to perform additional work.

Foreign income, accounts, assets, ownership interests, and transactions must be disclosed. Foreign-country returns and compliance are excluded. U.S. international information returns and reports, including FBAR and Forms 8938, 5471, 3520, and similar filings, are included only if expressly identified and accepted by ASY in writing. Disclose these matters early so filing responsibilities can be determined.

2. Document deadlines and automatic extensions

ASY will not begin preparing your tax return until you have provided all required tax documents and information. You are responsible for submitting a complete package, including all applicable tax forms, supporting schedules, and any additional documents ASY requests. Providing only part of your documents does not place your return in the preparation queue. The three-week deadline policy below is based on when ASY receives your complete package. This requirement does not prevent ASY from preparing an available extension under the conditions below.

Tax returns or preparation work received within three weeks (21 calendar days) before the applicable original filing deadline are not guaranteed to be completed or filed by that deadline. ASY will file the applicable available extension for accepted engagements in this period. This policy also applies when an earlier submission remains incomplete until that period.

By signing this agreement, you authorize ASY to prepare and submit available filing extensions for the returns covered by this engagement when needed. ASY must have accepted the engagement and received this signed agreement, necessary identifying information, sufficient information to prepare the extension, and any required authorization before the deadline. If those requirements are missing, an extension is unavailable, or the deadline has already passed, ASY cannot promise a valid extension and will notify you of the limitation. Delivery of records alone does not establish an accepted engagement. ASY will provide confirmation of extensions filed if requested.

An extension generally extends the time to file, not the time to pay. You remain responsible for paying taxes by the applicable payment deadline. Provide the information needed to estimate your balance and follow the payment instructions promptly. An extension does not eliminate interest, late-payment penalties, or estimated-tax penalties that otherwise apply.

Federal, state, and local extension rules may differ. An extension for one return does not necessarily extend another. Records received more than three weeks before a deadline also require timely cooperation, signatures, and payment; early delivery alone does not guarantee timely filing.

3. Your responsibilities

You agree to:

1. **Provide complete and accurate information.** Report all taxable income, whether or not a W-2, 1099, K-1, or other form was issued. Disclose business and rental activity, digital-asset transactions, foreign activity, relevant deductions and credits, and all states and localities where you lived, worked, or conducted business. Identify any returns or filings you believe may be required.
2. **Supply supporting records.** Keep evidence supporting income, expenses, credits, dependents, filing status, mileage, asset basis, improvements, depreciation, and carryovers. Summaries and worksheets do not replace underlying records. Provide prior returns and schedules when requested.
3. **Organize and total your records.** Submit legible, categorized information. Receipt totaling, reconciliation, research, and other cleanup work will be billed separately at **$150** per hour.
4. **Respond promptly.** Answer questions and provide missing information by the dates ASY communicates. Tell us immediately about corrected forms, omitted information, ownership changes, changes in family circumstances, or other facts affecting your return.
5. **Review your completed returns.** Before signing, review every return and schedule for completeness and accuracy. Verify names, identifying information, income, deductions, dependents, filing status, refund instructions, and bank account and routing numbers. Tell ASY about errors before authorizing filing. Client review does not remove ASY's applicable professional responsibilities.
6. **Sign and pay promptly.** Return all required authorizations and pay your invoice before ASY files your returns. For joint returns, each spouse must review the returns and sign the applicable authorizations. Signing this agreement does not replace a required e-file authorization.
7. **Pay your taxes.** Make federal, state, local, extension, and estimated payments on time. Confirm that payments are accepted and clear your account, maintain sufficient funds, and avoid duplicate payments. A scheduled electronic debit is not proof that a payment succeeded. ASY does not advance tax payments.
8. **File returns assigned to you.** Sign, mail, and pay any paper or local returns that ASY's delivery instructions assign to you. Retain proof of timely mailing and payment. Do not assume every prepared return will be electronically filed.
9. **Send notices promptly.** Provide the complete notice, all pages, and any envelope promptly after receipt. Do not assume ASY receives copies. Notice response or representation requires separate acceptance; preserve your response deadlines while arrangements are made.
10. **Use secure delivery and retain your records.** Send sensitive information through SmartVault or another ASY-approved secure method, or deliver it to the office. Do not send Social Security numbers, tax returns, or bank details by ordinary email or text. Maintain current contact information and download your completed documents. Keep your own records for the applicable retention periods, including longer-lived basis and carryover records. SmartVault is a delivery resource and does not replace your recordkeeping obligations.

4. Filing and delivery

ASY will identify which returns it will electronically file and which require your action. We will not transmit a return until we receive the required signed authorizations and payment in full. We will check electronic filing acknowledgments and communicate rejections requiring your assistance. A signed authorization or delivered copy is not confirmation of acceptance by a tax agency.

You must cooperate promptly in resolving rejected returns, including providing valid identity-protection PINs and other required information. ASY will explain any alternative filing steps. Delays in signatures, payment, or requested information may prevent timely filing.

Completed returns will be delivered digitally through SmartVault unless you select the paper-copy option on your client intake form. A paper copy selected on the intake form will be provided at no additional charge. Later replacement copies are subject to the fee below.

ASY does not electronically file local Earned Income Tax (EIT) returns. We will prepare and assemble your local EIT return. You are responsible for mailing it to the appropriate local tax agency. **Initials:** _____

5. Fees and payment

Tax preparation fees depend on the forms, complexity, and work required and may vary from year to year. Estimates are not fixed quotes unless expressly stated in writing. Additional services require agreement on their scope and fees.

- Receipt totaling, reconciliation, research, and other cleanup work: billed separately at **$150** per hour.
- Amendments caused by missing, late, or corrected client information: starting at **$250** per amended return. Corrections arising from ASY errors will be evaluated separately and are not automatically subject to this charge.
- Later replacement copies: **$75** per return; available copies may be downloaded from SmartVault without charge. This fee does not restrict access to records required by applicable law or professional obligations.
- New-client retainer: **$100** per tax year, nonrefundable and applied to the related service invoice. If you cancel or the engagement otherwise ends, the retainer will not be refunded, except where a refund is required by applicable law.

Payment is due upon completion and before filing. Unpaid invoices become delinquent 30 days after the invoice date. ASY may suspend work or withdraw for nonpayment after written notice identifying outstanding work and known deadlines. Reasonable collection costs may be charged only as permitted by law and applicable written terms. No automatic percentage collection surcharge is imposed by this draft.

Taxes legally owed remain your responsibility. Any allocation of penalties, interest, or correction costs will depend on the circumstances and applicable obligations; this agreement does not excuse ASY from its own errors or duties.

6. Confidentiality and communications

ASY maintains safeguards for client information and uses service providers as permitted by law to perform and support its services. Disclosure and use of tax return information remain subject to applicable confidentiality requirements. Where legally required, ASY will obtain a separate, compliant consent; signing this agreement does not provide unrestricted permission to use or disclose your information.

Ordinary email and text may be used for scheduling and routine administrative messages. Use approved secure methods for confidential records. Electronic systems involve risks, but acknowledgment of those risks does not waive ASY's legal safeguarding obligations. Requests to release returns or information to lenders, relatives, or other third parties require appropriate authorization and may involve additional services and fees.

7. Joint returns, termination, and completion

For a joint return, both spouses are clients and information material to preparing the joint return may need to be shared with both. Notify ASY promptly of separation, divorce, or a dispute affecting the engagement. ASY may require separate arrangements or withdraw if a conflict cannot be appropriately resolved. Each spouse must sign this agreement for a joint-return engagement.

Either party may terminate the engagement by written notice. ASY may suspend or withdraw for nonpayment, lack of cooperation, unresolved conflicts, unsupported tax positions, or other appropriate reasons, subject to applicable obligations. ASY will communicate the status of unfinished work and known deadlines. Fees for services already performed remain payable. The nonrefundable retainer described in Section 5 remains subject to those terms upon termination. Client records will be returned or made accessible as required by law and professional obligations despite a fee dispute.

For returns ASY agrees to electronically file, the preparation engagement concludes after delivery of the completed returns, confirmation of acceptance of those filings, and communication of any remaining client filing or payment tasks. For returns assigned to you for filing, it concludes upon delivery of the returns and filing instructions. Any unresolved rejected or unfinished return will be specifically addressed in writing. The engagement does not create an ongoing duty to monitor later tax-law changes, agency accounts, future payment obligations, or future filing years. If we become aware of an error or omission, we will communicate as required by applicable obligations; amendment or other follow-up work will be addressed separately.

Any unpaid fees for completed tax returns, including returns not picked up, will be sent to collections for nonpayment 30 days after ASY notifies you that your completed return is ready.

Acceptance

I/we have read this agreement, understand the scope and client responsibilities, and authorize the services and available filing extensions described above. Any change in scope must be accepted by ASY in writing.

Taxpayer signature: _____ Date: _____

Printed name: _____

Spouse signature (joint returns): _____ Date: _____

Printed name: _____

ASY acceptance / representative: _____ Date: _____

We'll count the beans... You enjoy the coffee!

Payment for ASY Services

Do you want our fees to be taken out of your return? ☐ Yes ☐ No

There is a $150 bank fee for this option. If yes, sign below.

Signature: _____ Date: _____

Spouse signature: _____ Date: _____

How did you hear about us?

_____

Include this completed form with your tax package or upload it to SmartVault.

Upload your completed form to SmartVault

Sign in to ASY SmartVault

1. Complete and sign the form, then save a copy of the PDF to your device.
2. Sign in and choose Upload Documents or Upload a Document.
3. **Choose your 2026 Source folder. Double-check the year before uploading.**
4. Select Upload file, choose your saved PDF, then click Save in SmartVault.
5. Look for the green check mark to confirm the upload.

Need an invitation or cannot find your 2026 Source folder? Call or text 717-759-4227.