MonettiStandard PC
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2023 TAX RETURN PREPARATION AGREEMENT

MonettiStandard PC (we) will prepare your federal and state income tax returns for the 2023 tax year based on the information you provide. Although our work does not include procedures to discover irregularities or inaccuracies in the tax data you provide, we may ask for clarification of certain information, or additional information, so we can prepare complete and accurate returns for you.

It is your responsibility to maintain and provide all necessary information related to income, deductions, and credits for the 2023 tax year, and to respond to inquiries promptly so we can accurately complete your returns by the appropriate due date. This includes completing the questionnaire accompanying this agreement and making all necessary disclosures. We will not begin work on your return until we receive the questionnaire, agreement, and payment for any open balances.

The information needed to complete your returns must be received no later than Monday, March 18th so that the returns may be completed by the original filing due date (April 15th). If an extension of time to file must be submitted, additional charges will apply and return preparation will be delayed. Taxing authorities may also charge penalties and interest.

You are responsible for maintaining and providing appropriate records, such as official tax documents you receive, receipts and substantiation when necessary, purchase and sales information for assets, and any other information that may affect your tax return. You are also responsible for providing information required to support your filing status, dependents, and/or tax credits claimed on your return. Information provided by text message will not be accepted.

It is your responsibility to review your returns before they are filed to determine that all income has been correctly reported and that you have met all IRS recordkeeping requirements. You are ultimately responsible for the completeness, accuracy, and timely filing of your tax returns.

We will use professional 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. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible. Services performed will comply with the Statements on Standards for Tax Services issued by the American Institute of Certified Public Accountants.

If you receive additional correspondence from taxing authorities, we will be glad to assist you or represent you if you desire. Our fees for preparing your returns do not include additional time required to assist with tax notices or examinations.

Our fees for the preparation of your returns are based on the complexity of the work and the condition of your records. **Invoices must be paid in full on the delivery of your returns**. Our agreement will be complete when your returns are submitted for e-filing.

If this accurately summarizes your understanding relating to the preparation of your tax returns, please sign and return this agreement with your tax information. **By signing below, you certify under penalties of perjury that all information provided by you, both written and oral, is true, correct, and complete to the best of your knowledge.**

MonettiStandard PC

Accepted by (for joint returns, BOTH spouses must sign):

______________________	__________	______________________	__________
Signature	Date	Signature	Date
______________________		______________________	
Name		Name	

MONETTI STANDARD
ACCOUNTANTS AND ADVISORS

2023 Tax Organizer

The purpose of this organizer is to help us prepare your returns so you can get the best tax result. If you have any questions, please call our office at (732) 255-3585.

Personal Information

Name		Occupation	SSN	Date of Birth
Taxpayer				
Spouse				

Address

Street		
City	State	Zip

Contact Information

Preferred Email

Preferred Phone #

Marital Status end of 2023	Other Information	Taxpayer	Spouse
___ Married	Are you blind?	__ Yes __ No	__ Yes __ No
___ Married Filing Separately	Are you disabled?	__ Yes __ No	__ Yes __ No
___ Single	Are you a full-time student?	___Yes __ No	__ Yes __ No
___ Widow(er) If spouse died in 2023 enter date of death ____________	Do you want $3 to go to the Presidential Election Campaign Fund?	__ Yes __ No	__ Yes __ No

Dependent Information

First and Last name	SSN	Relationship	Months in Home	Date of Birth	Disabled	Full-time Student

Account Information for Deposits or Withdrawals

Name of Bank	Bank Routing Number	Bank Account Number	Type of Account		Use this Account For	
			Checking	Savings	Deposits	Withdrawals

Questionnaire

Name: **SSN:**

Dependent Information **If this does not apply to you, check here ____and skip to the next section.**

Yes No

___ ___ Did you have any changes in dependents during the year?
___ ___ If "Yes,", explain____
___ ___ Can another person qualify to claim any of your dependents?
___ ___ Did you have any childcare expenses during the year?
___ ___ Did you have any adoption expenses during the year?
___ ___ Did you have any children under age 19 or a full-time student under age 24 with $4,300 or more of unearned income?

Provide documentation for proof of dependent-related credits (school records, medical Records, daycare records, etc.)

Health Care Information

Yes No

___ ___ Did every member of your household have health insurance?
If "Yes," provide copies of Form 1095-A or 1095-B.
___ ___ Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA during the year?
___ ___ Did you or any member of your family enroll in health insurance coverage through healthcare.gov?
If "Yes", provide copies of Form 1095-A

Income, Purchases, and Sales

Yes No

___ ___ Did you receive any tips not reported to your employer?
___ ___ Did you receive any unemployment or disability income during the year?
___ ___ Did you cash any U.S. savings bonds during the year?
___ ___ Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currencies, such as bitcoin?
___ ___ Did you receive any other income not provided with this organizer?
If yes, explain ____
___ ___ Did you start a new business or purchase any rental property during the year?
___ ___ Did you purchase any business assets or convert any assets to business use?
___ ___ Did you buy or sell a principal residence during the year?
If "Yes," provide closing documentation for the purchase and the sale of the home.
___ ___ Did you have a principal residence or a piece of real property foreclosed on during the year?
___ ___ Did you abandon a principal residence or piece of real property during the year?
___ ___ Did you refinance your principal home or second home or take out a home equity loan during the year?
If "Yes," provide all escrow, closing, and other pertinent documentation and information.
___ ___ Did you receive any principal or interest during this year from property sold in prior years?
___ ___ Did you rent out your home or use it for a business?
___ ___ Did you sell, exchange, or purchase any real estate during the year?
___ ___ Did you acquire a new or additional interest in a partnership or S corporation?
___ ___ Did you have any debts canceled or forgiven this year?
___ ___ Does anyone owe you money that has become uncollectible?
___ ___ Did you purchase a new hybrid, alternative motor, or electric motor energy-efficient vehicle during the year?
If "Yes," provide the year, make, model, VIN, and date the vehicle was placed in service.
___ ___ Did you pay or receive alimony?
If "Yes," provide the date of the agreement___________ and the date of the most recent revision, if any______________.
___ ___ Did you sell any stocks or other securities, or did they become worthless?

Questionnaire

Name: **SSN:**

Itemized Deduction Information

Yes No

___ ___ Did you pay out-of-pocket medical or dental expenses (premiums, prescriptions, mileage, etc.) during the year? Please provide us with a total and keep the receipts for your records.
___ ___ Did you pay any long-term care premiums for yourself, your spouse, or dependent during the year?
___ ___ Did you receive any state or local income tax refunds from prior years?
___ ___ Did you make any major purchases (vehicle, boat, etc.) during the year?
___ ___ Did you pay any real estate property taxes during the year?
___ ___ Did you pay mortgage interest during the year?
___ ___ Did you make cash donations to charity during the year?
___ ___ Did you make noncash donations to charity (clothes, furniture, etc.) during the year?
___ ___ Did you have gambling winnings or losses during the year?

Retirement Information **If this does not apply to you, check here ____and skip to the next section.**

Yes No
___ ___ Did you convert any traditional, SEP, or SIMPLE IRS's to a Roth IRA in 2022?
___ ___ Did you receive any payments from a retirement account, such as an IRA, a pension, profit sharing, or 401(k) plan during the year? If so, were any amounts rolled over?
____ Yes ____ No
___ ___ Did you receive any Social Security benefits during the year?

Education Information **If this does not apply to you, check here ____and skip to the next section.**

Yes No

___ ___ Did you pay tuition expenses that were required for attending college, university, or vocational school for yourself, your spouse, or a dependent during the year (even if classes were attended in another year)?
If yes, provide form 1098-T and a college billing statement.
___ ___ Did you contribute to or receive a distribution from an Educational Savings Account or Qualified Tuition Program during the year?
___ ___ Did you pay student loan interest for yourself, your spouse, or your dependents(s) during the year?
___ ___ If you had education expenses, did you use any tax advantage funds like a 529 plan?
___ ___ Did you contribute any money to a NJBEST college savings account?
If so, how much? _______
___ ___ Did you make loan or interest payments on a NJCLASS student loan?
If so, how much? _______

Foreign Accounts

Yes No

___ ___ Did you have an interest or signature authority in a foreign bank account, foreign trust, or foreign real estate?
___ ___ Did you receive any income from, or pay taxes to, a foreign country?

Miscellaneous Information
How would you like to receive your completed returns? (Please check one).

_______ Please send my returns using the secure portal.
_______ Please mail my returns. (A $30 paper processing fee will be added)
_______ I would like to pick up my returns. (We will call you when the return is complete. A $30 paper processing fee will be added).

Questionnaire

Name: **SSN:**

Yes	No	
___	___	Can you or your spouse be claimed as a dependent by someone else?
___	___	Did you make gifts to any one person in excess of $17,000 during the year?
___	___	Did you make any energy-efficient improvements to your main home during the year?
___	___	Did you apply an overpayment of your 2022 taxes to your 2023 estimated taxes?
___	___	If you have an overpayment of 2023 taxes, do you want the refund applied to your 2024 estimated taxes?
___	___	Did you receive any notices from the IRS or state taxing authority? If "Yes,", explain ______
X	___	May the IRS discuss your tax return with your preparer?
___	___	Do you anticipate your income or withholdings to be different for 2024?
___	___	Are you or a spouse a military veteran?
___	___	Do you have a will?
___	___	Do you own any trusts?
___	___	Are you financially prepared for retirement?
___	___	Is there any other information that affects your return? If so, please describe below.
___	___	Do you have any questions or concerns we can help you with, If "Yes," please describe below.
___	___	Did anyone in your household receive an identity protection personal identification number (IP PIN)? If "Yes,", please provide a copy of the IRS notice.
___	___	If you qualify, do you want to make an IRA contribution?

Estimates

Please complete below if you made any quarterly tax payments:

	Federal		Resident State	
	Date Paid	**Amount**	**Date Paid**	**Amount**
Overpayment applied from 2022				
First Quarter				
Second Quarter				
Third Quarter				
Fourth Quarter				
Additional Payments				

Additional Notes: