MonettiStandard PC
Tel: 732-255-3585 Fax: 732-255-1903

1861 Hooper Avenue Suite 8
Toms River. NJ 08753

2025 TAX RETURN PREPARATION AGREEMENT

MonettiStandard PC (we) will prepare your federal and state income tax returns for the 2025 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 2025 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 **Tuesday, 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. Tax information provided by text message or email 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. We now require a valid credit/debit or bank account on file before services are performed. **Invoices must be paid in full on the delivery of your returns**. Our agreement will be complete upon submission of form 8879 and the e-filing of your tax return.

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

2025 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

Taxpayer Names	Occupation	SSN **(New Clients Only)**	Date of Birth **(New Clients Only)**
Taxpayer 1			
Taxpayer 2			

Street Address

☐ Check here if no change

City	State	Zip

Marital Status end of 2025

____ Married
____ Married filing Separetly
____ Head of Household
____ Single
____ Widow(er)

If spouse died in 2025, please enter date of death ________

Other Information

	Taxpayer 1		Taxpayer 2	
Are you a veteran?	__ Yes	__ No	__ Yes	__ No
Are you a U.S. citizen?	__ Yes	__ No	__ Yes	__ No
Are you blind?	__ Yes	__ No	__ Yes	__ No
Are you disabled?	__ Yes	__ No	__ Yes	__ No
Are you a full-time student?	__ Yes	__ No	__ Yes	__ No
Do you want $3 to go to the Presidental Election Campaign Fund?	__ Yes	__ No	__ Yes	__ No

Preferred Method of Contact

☐ Email ☐ Phone

Email

Phone Number

Dependent Information

☐ Check here if no change

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

Account Information for Deposits or Withdrawls

☐ Check here if no change

Name of Bank	Bank Routing Number	Bank Account Number	Type of Account		Use this account for	
			Checking	Savings	Deposits	Withdrawls

How would you like to receive your completed returns?

____ Please send my returns using the secure portal

____ Please mail my returns. **(A $40 paper processing fee will be added.)**

____ I would like to pick up my returns. (We will call you when the return is complete. **A $40 paper processing fee will be added.)**

Questionnaire

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

Yes	No	
____	____	Did you have any change in dependents during the year?
		If "Yes" please 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 the age of 24 with $5,200 or more of earned income or $1,350 of unearned income?
		Provide Documents 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 (HAS), 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 a copy of Form 1095-A

Education Information

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 dependent(s) during the year?
____	____	If you had education expenses, did you use any tax advantages 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? ________________

Retirement Information

Yes	No	
____	____	Did you convert any traditional, SEP, or SIMPLE IRA's to a Roth IRA in 2025?
____	____	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?
____	____	Did you receive all required minimum distributions (RMD's) from retirement accounts in 2025?

Questionaire

Income, Purchases and Sales

Yes	No	
____	____	Did you receive any tips not reported by 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 documentation for the purchase and the sale of the home.
____	____	Did you have a principal residence or a piece of real property foreclosed during the year?
____	____	Did you abandon a principal home or piece of real property during the year?
____	____	Did you refinance your principal home or second home or take out ahome equity loan in 2025? If "Yes", provide all escrow, closing or 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 uncollectable money?
____	____	Did you purchase a new hybrid, alternative motor or electric motor energy efficient vehicle in 2025? 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?

Tip Deduction

Yes	No	
____	____	Did you receive any tip income in 2025? If "Yes", provide documentation such as a paystub and indicate the amount of qualified tips received $____________ Certain tips, such as tips required for large parties, are not eligible.

Overtime Deduction

Yes	No	
____	____	Did you receive any overtime pay in 2025? If "Yes" provide documentation such as a paystub and confirm ______ (check here) that your overtime pay was required by the FLSA. Please note that one the premium part (e.g. the extra "half-time" pay) is eligible for the deductions, not the entire amount.

Questionaire

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 the total and keep the receipts for your records.**
____	____	Did you pay any long-term care premiums for yourself, your spouse or dependents?
____	____	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 on a loan used to purchase or improve your personal residence?
____	____	Did you make any cash donations to charity during the year? Total cash donations $________
____	____	Did you make noncash donations to charity (clothes, furniture, etc.) during the year? Value $_________
____	____	Did you have gambling winnings or losses during the year?
____	____	Did you purchase a vehicle with a loan in 2025? If "Yes", provide purchase documents and proof of interest paid in 2025.
____	____	Did you incur expenses as an elementary or secondary educator? If so, how much? $__________

Foreign Accounts

Yes	No	
____	____	Did you have any interest or signature authority in a foreign bank account, trust, or real estate?
____	____	Did you receive any income from, or pay taxes to, a foreign country?

Miscellaneous Information

Yes	No	
____	____	Can you or your spouse be claimed as a dependent by someone else?
____	____	Did you make gifts to any one person or trust in excess of $19,000 during the year?
____	____	Did you make any energy-efficent improvements to your main home during the year?
____	____	Did you apply an overpayment of your 2024 taxes to your 2025 estimated taxes?
____	____	If you have an overpayment on your 2025 taxes, do you want the refund applied to your 2026 estimated taxes?
____	____	Did you have any unpaid sales or use taxes in 2025 (such as online purchases with no tax charged)? If so, how much? $__________
____	____	Did you receive any notices from the IRS or State taxing authority? If "Yes", please include a copy
X	____	May the IRS discuss your tax return with your preparer?
____	____	Do you anticipate your income or withholdings to be different in 2026?
____	____	Do you have a will?
____	____	Do you own any trusts?
____	____	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?

Questionaire

Estimates **Please complete below if you have made any quarterly tax payments:**

	Federal		Resident State	
	Date Paid	Amount	Date Paid	Amount
Overpayment amount applied from 2024	________	________	________	________
First Quarter	________	________	________	________
Second Quarter	________	________	________	________
Third Quarter	________	________	________	________
Fourth Quarter	________	________	________	________
Additional Payments	________	________	________	________

Additional Notes

Account Authorization for Payment

Please complete one of the following options

Credit / Debit Account Information

Cardholder Name ____

Card Number ____

Expiration Date _____________ Security Code ______________

Card Type ____________________ Billing Zipcode ______________

Bank Account Information

Accountholders Name ____

Account Number ____

Routing Number ____

Account Type __________________________

I authorize MonettiStandard PC to charge the account indicated above for the preparation of the tax return and I certifty that I am an authorized user of this account and that I will not dispute the payment with my account's company, so long as the transaction corresponds to the information comminucated by my preparer.

Signature _____________________ Date ___________