Ken-Mar Tax, Inc.
tax preparation and financial services

23201 Lorain Rd.
North Olmsted, OH 44070
440-777-2207
www.kenmartax.com

PLEASE READ! Tax Preparation Checklist

Having the necessary documents organized before you meet with your tax preparer can speed up the filing process. Use this checklist to gather all the information you need to get ready for your tax preparer.

Dependent Related Items (Head of Household, Child Tax Credit, Claiming a Dependent)

- **Birth Certificates** for all dependents
- School record, medical record, child care statement or other documentation to **prove child's address**
- **Form 8332** if claiming a child that does not live with you for more than 6 months of the year
- **Head of Household** Filing Status - Supporting Documentation that you provided 50% support for dependents
- **Dependent Care Credit** - must have Daycare or Preschool Annual Statements showing FEIN, Address, Phone Number, and Name of Child Care Provider

Businesses and Rentals (a completed organizer sheet if you don't have supporting documentation)

- **Forms 1099s**
- Taxpayer's summary of **income**
- Taxpayer's summary of **expenses**
  - **Mileage** Documentation
  - Need to keep receipts for **meals**
  - Business **gifts** are capped at $25 per person per year
- **Supporting Documentation** for any rentals, business or itemized deductions (this could be Accounting Records, Receipts, or Bank Statements)
- **City Breakdown** (Realtors)

Income Documentation

- **All W2s**
- **All 1099s** (self-employment/ pension/annuity/retirement accounts/ unemployment/state or city refunds/ investment accounts)
- **Social Security statements**
- **Gambling Winnings** or Losses (Documentation)
- Year End **Investment Broker** 1099B
- **Cryptocurrency** transaction list
- **K1s** from S-Corps, trusts or partnerships
- Purchase and Sale information on **sales of personal assets**
- **1099-Ks**

Other Deductions & Credits

- **Charitable Contributions** (greater than $250 per organization need a letter)
- **H.S.A.** contributions and distributions
- Contributions to a **traditional IRA** or self-employed retirement account
- Contributions to an **Ohio 529** plan
- 1098-T (**Education Statement**)
- 1098-E (**Mortgage Statement**)
- **1095A Only**

General Documentation

- **Driver's license**s for taxpayers
- Amount of **Estimated Tax Payments** made to the IRS, State or City

The IRS is Increasing Preparer Responsibility
and Disciplinary Action for Non-Compliance.
Documentation will be required before return can be started.

Ken-Mar Tax Intake & Tracking Sheet

All clients (new and returning) must provide the data on the left side of this sheet before we can process your return:

Name:	
Phone: ( )	
Email:	

New clients continue to complete this section. Returning clients complete only items that have changed since your last tax return.:

Driver's License #:		
License Issue Date: License Expiration Date:		
Spouse's Full Name:		
Spouse's Date of Birth:		
Spouse SSN:		
Spouse's Driver's License #:		
Spouse's License Issue Date: Spouse's License Expiration Date:		
Dependents:	DOB	Social Security #
**For each dependent a copy of their Birth Certificate & Proof of		
Residency is REQUIRED. I. E.: report card, medical bill.		

New Clients to Complete this Section:

Date of Birth:	
Taxpayer SSN:	
Street Address:	
City, State, Zip	
Referred by ______________________________	

OFFICE / INTERNAL USE ONLY

Date:	Notes

ASSIGNED TO:

Ken Brittany

Date:		
	Dropped Off	
	Logged In	
	Preparer Completed	
	Notified to Pick Up	
	Paid	
Date:		
	Pull Forward in Drake	
	Compare to Prior Year	
	Gather Missing Info	
	Scan Packet to GW	
	Import GW File	
	Update in CSM	
	GW Price	
	Total Fee	$

Ken-Mar Tax Update Client Information

****** New and Returning Clients Required to Complete ******

Name ____ Date (including year) ______________________

General Information

1	Did you move in 2023? If yes, the date you moved ________________, 2023 Previous Address: ____	Yes	No
2	Has your bank account information changed from last year? If yes, provide **new** information below: Name of Bank _________________________ Checking or Savings _______________ Acct #__________________ Rtn # ________________	Yes	No
3	Did you have any major life changing events in 2023? (job, marriage, children) If yes, explain ____	Yes	No
4	Were you, your spouse, or any dependents a victim of identity theft? If yes, were you issued an Identity Protection PIN (IP PIN)? If yes, please provide Notice CP01A from the IRS.	Yes Yes	No No
5	Is there a custody agreement with tax dependency instructions we need to know about for your dependent(s)?	Yes	No
6	Do you anticipate your tax results to be similar to last tax year? If no, why?	Yes	No
7	Did you receive any notices from the IRS, State, or City in 2023 that remain unresolved. If yes, please provide a copy of the notice.	Yes	No
8	Would you like a copy of your tax return sent to you electronically via the Portal **instead of** receiving a printed copy?	Yes	No

Tax Information

9	Did you make any distibutions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan in 2023?	Yes	No
10	Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan (outside of payroll) in 2023?	Yes	No
11	Did you make any contributions to an HSA (outside of payroll) in 2023?	Yes	No
12	Did you do any bartering in 2023?	Yes	No
13	Did you receive your health coverage through the Marketplace? Did you receive a 1095-A?	Yes Yes	No No
14	Did you pay any **IRS** estimates toward tax year 2023? $______________ Did you pay any **State** estimates? $_______________ Did you pay any **City** estimates? $_______________	Yes Yes Yes	No No No
15	Did you purchase a new or used clean vehicle (electric vehicle, plug-in hybrid fuel-cell vehicle, qualified commercial clean vehicle) in 2023?	Yes	No
16	Did you make any energy-star rated improvements to your main home in 2023?	Yes	No
17	Did you make gifts to any one person in excess of $17,000 in 2023?	Yes	No

Digital Assets and Foreign Activity

18	In 2023, did you have financial interest in or are you a signer on a financial account in a foreign country?	Yes	No
19	In 2023, were you at all involved with a foreign trust?	Yes	No
20	Do you have any foreign assets or receive any foreign gifts in 2023?	Yes	No
21	In 2023, did you deal in any virtual/crypto currency (bitcoin)?	Yes	No

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Phone: (440)777-2207 | Fax: (440)577-4078

This engagement is entered into by and between Ken Mar Tax and the undersigned individual(s).

Scope of Services
We will prepare your 2023 federal, state and local income tax returns. We will depend on you to provide the correct information needed to prepare complete and accurate returns.

We may ask you to clarify some items but will not audit or otherwise verify the data you submit. Our work will not include procedures to find defalcations or other irregularities, but we will inform you of any material errors, fraud, or other illegal acts we discover.

We will return your original records to you at the end of this engagement. Store these records, along with all supporting documents, in a secure location. We retain copies of your records and our work papers from your engagement for up to three years, after which these documents will be destroyed.

Tax information submitted after March 31st is not guaranteed to be filed by the April filing deadline. Tax information submitted after September 15th is not guaranteed to be filed by the extension deadline and rushed completion will be subject to an increase tax preparation fee.

No tax returns will be filed until we have a signed 8879 e-file Signature Authorization on file and the tax preparation fee has been paid. If we are not able to file your return by the tax filing deadline, you authorize Ken Mar Tax to file an extension on your behalf.

If you have not selected to e-file your returns with our office or are otherwise required to paper-file, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them. Our engagement to prepare your 2023 tax returns will conclude with the delivery of the completed returns to you, or with e-filed returns, with your signature and our subsequent submittal of your tax return.

Changes to Scope of Services
If, during the course of the engagement, additional services are requested that were not initially agreed upon, the additional fees and expanded scope of work will be discussed and agreed upon before further work is done.

Client Responsibilities
The law imposes penalties when taxpayers underestimate their tax liability. This includes failure to pay estimated taxes. You will be responsible for any penalties incurred regarding this issue. Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Fees
Our fee is based on the amount of forms produced and the complexity of the return plus out-of-pocket expenses. Invoices are due and payable upon presentation and before the tax return is filed. All accounts not paid within thirty (30) days are subject to interest charges to the extent permitted by state law.

Termination
Either party may terminate this engagement at any time by providing written notice to the other party. If terminated, fees will be prorated based on the services provided up to the termination date.

By signing below, you acknowledge and agree to the terms outlined in this engagement letter.

Client Signature: ____ Date: ____________________

Spouse Signature: ____ Date: ____________________

Preparer Signature: ____ Date: ____________________

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2023 TAX SEASON INFORMATION

DATES

Clients who submit information after the following dates will NOT be completed timely:

02/28 (S-Corps/Partnerships)
03/31 (Individuals/C-Corps)

Clients on Extension
08/15 (S-Corps/Partnerships)
09/15 (Individuals/C-Corps)

*Rushed completion will be subject to increased tax prep fee

IN PERSON APPOINTMENTS

Limited In-Person Appointments this year!

Please call ASAP to schedule if you want an appt. Once appointments times are taken, only drop offs will be accepted.

EXTENSIONS

-Mandatory for tax year 2023-

ALL EXTENSIONS MUST BE PROMPTED BY A WRITTEN REQUEST OR EMAIL FROM THE CLIENT

DROP OFFS

We can accept tax information via:

- Drop off to office receptionist
- Drop off to locked mailbox outside office
- Portal Import (secure)
- Mail

DEADLINES

Just a reminder, the tax deadlines are:
03/15 – (S-Corps/Partnerships)
04/15 – (Individuals/C-Corps)

Please do not wait to submit your information!

2023 TAX UPDATES

- SECURE 2.0 Act
- Energy Efficiency Credit

PORTAL ACCESS

1) Clevelandtaxconsultant.com
2) **Portal Login** at top right of page
3) Login or Upload as a Guest

Link to reset credentials on the Login page

ORGANIZER SHEETS

Organizer sheets for businesses and rentals available in the portal.

Please call the front desk to request one be emailed if you cannot access your portal account.

MEET THE TEAM

Kenneth Weinberg
Enrolled Agent/Owner
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Brittany Gradisek
Tax/Bookkeeping/Payroll
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Christy Rogers
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