Ulster Financial Services Inc.

Tax Service Engagement Letter

Please return this completed form with your 2022 tax information

***Exciting news! Beginning January 2023, we will be providing E-signatures and client portals!**

***Please do not staple documents together**

Full Name(s)	
Best Contact Number	
E-Mail Address	

Documents to return with this form Check List:

1. **______ Copy of your driver's license (front and back) if updated or renewed in 2022**
2. **______ Copy of voided check for direct deposit refunds**
3. **______ For any new dependents – copy of Birth Certificate and Social Security Card**

Additional Information that may be needed to prepare your tax return:

Tax Subject Matter	Documents Required if Applicable
Education: Proof of Expenses	Form 1098 Provided by school or available online.
Child Claimed as Dependent: Proof of Status	Proof the child has lived with you for 6 months or more in 2022. Proof that the child has the same address as you – such as a school or medical document.
Energy Efficient Home Improvements	Purchase receipts or invoices.
Self-Employed and Rental Properties	Complete list of income and expenses. Expenses must be substantiated for tax benefit, e.g., mileage logs, receipts.
Clean Vehicle Credit	Copy of purchase invoice.
Unemployment	Form 1099-G from NYS website. NYS does **not** mail form.

This letter confirms that you have engaged Ulster Financial Group, Inc. to prepare your federal and state individual tax return for tax year 2022. Ethical standards require us to determine that all the information you provide supports the type of return you are requesting we file. If we are unable to make that determination, we may not be able to proceed.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. As a reminder, you should retain all documents, canceled checks and other documents that support the basis of income and deductions.

Attached is a questionnaire to guide you in gathering the necessary information.

Our fee for these services will be based upon the amount of time required at standard billing rates.

Client Signature:	Date:
______________________________________	__________________________________
______________________________________	__________________________________

INCOME TAX RETURN CHECKLIST

Dependents and filing status	**Yes**	**No**	**Comment**
Did your address change?			
Did you marital status change?			
Were there any changes in dependents?			
Are you supporting anyone not living with you?			
If you are separated or divorced and have child(ren), do you have a separation agreement or divorce decree that establishes custodial responsibilities?			
Income	**Yes**	**No**	**Comment**
Have you changed employment?			
Has your income changed?			
Do you have self-employment income or loss?			
Did you start a business, purchase a rental property or farm, or acquire interests in partnerships of S corporations?			
Did you receive any disability or unemployment payments?			
Did you receive alimony?			
Did you surrender any U.S. savings bonds?			
Did you have foreign income/gifts?			
Did you buy or sell any stocks, bonds or other investment property?			
At any time during 2022, did you (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?			
Did you have any cancellation of debt (1099-C)?			
Did you make any withdrawals from an IRA or Pension before age 59 1/2?			
Did you make any withdrawals from an education savings account or Section 529 plan?			
Do you own a second residence or any other real estate? If so, do you rent it out?			
Do you have any foreign bank accounts?			
Did you have any jury duty income?			

Itemized deductions	Yes	No	Comment
Did you pay out-of-pocket medical expenses (co-pays, prescriptions, braces, hearing aids, etc.)?			
Did you take out a home equity loan this year?			
Did you purchase, sell, or refinance your principal home or second home, or take out a home equity loan?			
Did you face any foreclosure transactions on your personal residence?			
Do you have any charitable contributions?			
Do you have any medical or charity mileage?			
Did you have any property damaged due to a storm, fire, or other natural disaster located in a federally declared disaster area?			
Retirement	**Yes**	**No**	**Comment**
Did you or your spouse reach age 72?			
Did you or your spouse receive Social Security benefits?			
Are you or your spouse an active participant in an employer-provided retirement plan such as pension, profit sharing, 401(k), Roth 401(k), or stock purchase plan?			
Did you receive a distribution from a pension, profit sharing, or retirement plan [401(k), IRA, SEP, etc.]? If yes, did you partially or totally roll it over into another IRA or qualified plan within 60 days of the distribution?			
Did you convert part or all of your regular IRA/SEP/SIMPLE IRA into a Roth IRA?			
Have you or do you plan on contributing to a Traditional IRA, Roth IRA, SEP, Keogh or SIMPLE plan?			

Miscellaneous	Yes	No	Comment
Were you notified by the IRS or state agency of changes to a prior year's return?			
Did you go through bankruptcy or foreclosure proceedings?			
Did you make any estimated federal or state tax payments?			
Were you a resident of (or did you have income in) more than one state?			
Did you pay anyone for domestic services in your home?			
Do you have any daycare costs for your dependents?			
Did you adopt a child or begin the adoption process?			
Did you receive any assistance from your employer to pay for education expenses, child care costs or adoption expenses?			
Did you give a gift of more than $16,000 to one or more people?			
Are you enrolled in health insurance through the Marketplace?			
Did you make purchases of taxable property or services outside of NYS? Were those purchases or services used in NYS?			