



PLS FINANCIAL INC

721 US HIGHWAY 1 SUITE 105 • NORTH PALM BEACH, FLORIDA 33408

Office: (561) 693-1014 • Fax: (866) 922-5858 • Tax Cell: (561) 951-6741

Website: www.plsfinancialinc.com • Email: admin@plsfinancialinc.com

TAX PREPARATION SERVICES

Filing Status ☐ Single ☐ Married Joint ☐ Head of Household ☐ Qualifying Widower ☐ Married Separate

[Taxpayer] Name	[T] Birth Date	[T] Social Security Num	[T] Occupation Description
[Taxpayer] Driver's License Number	[T] Issue Date	[T] Expiration Date	[T] E-mail Address
[Spouse] Name	[S] Birth Date	[S] Social Number Num	[S] Occupation Description
[Spouse] Driver's License Number	[S] Issue Date	[S] Expiration Date	[S] E-mail Address
Current Street Address		City	State [XX] Zip [XXXXX]
Home Phone	[Taxpayer] Cell Phone	[Spouse] Cell Phone	

Can any other Taxpayer claim you or spouse as a dependent? **(Check One)** Yes No

Dependents: (Only list the ones that you intend to claim on your taxes, dependents must be related by blood or marriage for EIC purposes) The IRS has been spot checking tax returns to verify EIC eligibility, be sure that you are able to prove that you have the right to claim your dependents for EIC in the event of an IRS mail audit of your Tax Return. If you are not able to prove that you are eligible to claim your dependents for EIC purposes you will be denied EIC and required to repay previous years of EIC for those dependents. You must be related to your EIC dependents by blood, marriage, or have court papers placing the dependents in your custody and care. You must have provided at least 50% of the dependents support, and the dependent must have lived in the household with you for at least six months during the previous year. **Your** Tax Service will not knowingly prepare or file a Tax Return or participate in any type of EIC Tax Fraud. You are responsible for all information provided to **Your** Tax Service during the preparation and filing of your Tax Return, so make sure that all the information is true and correct. **Special Warning for Schedule C Filers with or without EIC!** You are required to provide documentation for all income claimed on your tax return, and all expenses and deductions claimed on your tax return. All the information must be signed and dated by you as the owner of the business. You must be able to prove that you were in business, some examples of acceptable proof that can be provided are, business cards, yellow page ad, flyers promoting your business, 1099 Misc. showing business income, income statements showing business income, bank statements showing business deposits, and expense statements showing purchases for the business. We will keep a copy of all documents provided, and you are required to keep a copy for your records.

Client Acknowledgement Statement:

Dependent Information

First and Last Name	Social Security	Birth Date	Relationship	Months [01-12]	Months Lived With You
First and Last Name	Social Security	Birth Date	Relationship	Months [01-12]	
First and Last Name	Social Security	Birth Date	Relationship	Months [01-12]	
First and Last Name	Social Security	Birth Date	Relationship	Months [01-12]	

This certification statement must be acknowledged if claiming children in lines above.

I certify that I have provided over 50% care of the child / children on my tax return, and that the child / children lived with me for over half of the year. I understand that in the event I am audited by IRS, I will need to be able to provide accurate paperwork as required by the IRS. The following examples of proof that will be required by the IRS: proof of relationship, the child is my son, daughter, stepchild, foster child, brother, sister, stepbrother, stepsister, or a descendant of any of them. The IRS may also request additional information such as dependent school records, shot records, birth certificates, proof of residence (apartment lease, home lease, and utility bills), custody papers, custody records, court documents, adoption records, etc. **Statement Acknowledgement:** _____

BANK ACCOUNT TO DEPOSIT YOUR REFUND? **BEFORE** your returns can be e-filed, we **MUST:**

1. **RECEIVE SIGNED FORMS 8879** In person or e-Signature option a completely electronic way to sign your 8879 form.
2. **RECEIVE SIGNED CLIENT INFORMATION SHEET** (If new client)
3. **RECEIVE FEES FOR TAX PREPARATION SERVICES.** You can pay in person, online, or using bank product option.

Bank Name:	Routing Number:	Account Number:
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Return Type ☐ Bank Product 14- 21Days **(Fees Paid From Refund)** CK, DD, Walmart ☐ E-file Return **(Fees Paid Before Submission)**

I/We attest that the above information is correct to the best of my/our knowledge. I fully understand that **PLS FINANCIAL INC** Tax Service is a commercial tax preparation business and does not prepare taxes for free. **PLS FINANCIAL INC** Tax Service charges a minimum **\$150.00** sit fee, if you change your mind after we have prepared your taxes and you decide that you do not want us to file your tax return you will need to pay the **\$150.00** sit fee.

[Taxpayer] Signature	[T] Date	[Spouse] Signature	[T] Date
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TAX PREPERATION SERVICES

Yes	No	Did your marital status change during the year?
Yes	No	Did your address change during the year?
Yes	No	Could you be claimed as a dependent on another person's tax return?
Yes	No	Were there any changes in dependents?
Yes	No	Did you and your dependents have health care coverage for the full year?
Yes	No	Did you receive any of the following IRS documents? Form 1095-A (Health Insurance Marketplace Statement), 1095-B (Health Coverage) or Form 1095-C (Employer Provided Health Insurance Offer and Coverage) If so, please attach, or give form to preparer.
Yes	No	If you or your dependents did not have health care coverage during the year, do you fall into one of the following exemptions categories: Indian tribe membership, health care sharing ministry membership, religious sect membership, incarceration, general hardship or unable to renew existing coverage? If you received an exemption certificate, please attach, or give form to preparer.
Yes	No	Did you receive unreported tip income of \$20 or more in any month? If yes, please provide proof
Yes	No	Did you receive any disability or Social Security income? If yes, please provide 1099SSA
Yes	No	Did you buy or sell any stocks, bonds, or other investment property? If yes, please 1099 Interest / 1099 Dividends
Yes	No	Did you receive a distribution from or contribute to a retirement plan (401(k), IRA, etc.)?
Yes	No	Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?
Yes	No	Did you pay a home mortgage interest or real estate taxes this year?
Yes	No	Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?
Yes	No	Did you transfer or rollover any amount from one retirement plan to another?
Yes	No	Did you convert part or all of your traditional/SEP/SIMPLE IRA to a Roth IRA?
Yes	No	Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? You will need a 1098T Form to claim education credits!
Yes	No	Did you incur a loss because of damaged or stolen property?
Yes	No	Did you use your car on the job (other than to and from work)? You will need a mileage Log to claim!
Yes	No	May the IRS discuss your tax return with your preparer?
Yes	No	Was your home rented out or used for business?
Yes	No	Were you notified or audited by either the IRS or the State taxing agency?
Yes	No	(Reserved)
Yes	No	(Reserved)
Yes	No	(Reserved)
Yes	No	(Reserved)
Yes	No	(Reserved)

Preparer Notes