

MARCH 15, 2024--Deadline to submit information before an extension may be required

To be sure that we have the most up-to-date contact information, please complete the following items:

Name: _____

Email address: _____

Phone Number: _____ Type: _____

Please check the appropriate boxes and provide additional information, if necessary, for 2023.

Tax Return Delivery

Carefully review these options to choose the one that works best for you.

Option #1--PAPERLESS using SafeSend Returns:

- A secure link to your tax return, e-file forms, vouchers and any other documents will be sent to you electronically via email. For security, you will be sent an access code and have to answer knowledge-based authentication questions to access your return.
- After accessing your return, you can review it and even download it to your computer.
- You can electronically sign the E-File authorization forms using the IRS compliant E-Signature feature which will return them to us and send us a notification that they have been signed.
- Vouchers can be downloaded, printed and mailed in with payment or a link is provided to pay electronically. There is also a payment reminder system that will send reminder emails throughout the year when payments are due.

Your supporting documents (such as W-2s, 1099's, etc) will be scanned into our records then shredded. If you need/want your originals, please make copies of your documents to submit to us.

Option #2--PAPER:

- Your tax return, e-file forms, vouchers and any other documents will be printed out on paper.
- You will pick up your return and supporting documents when the return is complete.
- The e-file forms can be signed in our office when you pick up your return, or you can take them with you and return them, signed, at a later time.

The option I choose is:

Option #1-PAPERLESS

Initial this box if you've made copies of your documents.

Option #2-PAPER

Preparer Permissions

Yes No

- 1 If necessary, do you want the IRS and/or the Indiana Department of Revenue (or other applicable state agency) to be able to discuss the returns with the preparer?

Refund Information

- Yes No 2 If you are receiving a refund, do you want it deposited directly into your bank account?
 If yes, where would you like it deposited?
 Same account as last year
 New account, please provide voided check or the following bank information:
 Bank Name _____ Type of Account _____
 Bank Routing Number _____ Your Account Number _____

Personal & Dependent Information

- 3 Could you be claimed as a dependent for 2023 on another person's tax return?
- 4 Are you an unmarried child who was 19 years of age or older at the end of 2023 and more than half of your support was provided by your parent(s)/guardian(s)?
If you answered yes:
 Yes No
 Are you a full-time student?
 Did you earn less than \$4,700 in 2023?

Retirement Plans (Please be sure to include all 1099's)

- 5 Did you make a contribution to a retirement plan NOT through your employer in 2023?
- 6 Did you convert part or all of your traditional, SEP, or SIMPLE IRA into a Roth IRA?
- 7 Are you interested in making additional contributions to a retirement plan (IRA, etc.) for 2023?
- 8 Did you inherit an IRA or a retirement account during 2023?
- 9 At any time during '23, did you (a) receive (as a reward, award, or payment for property or services, including mining); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? If so, please provide us with the details.

Miscellaneous (Please include all 1099's, W-2G's, etc.)

- 10 Did you receive a 1099-K for online sales? (Examples: Facebook Marketplace, Ebay, etc.)
- 11 Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?
- 12 Did you get a distribution from, or were you a grantor of or transferor to a foreign trust?
- 13 Were you notified by the IRS or other taxing authority of any changes in prior year returns that you have not already notified Rader & Rader about?
- 14 Did you receive an Identity Protection PIN from the Internal Revenue Service or have you been a victim of identity theft? If yes, please provide the information.
- 15 Did you buy health insurance from the exchange? We must report and reconcile the premium assistance credit on your tax return. If so, please include the Form 1095-A or 1099-H that you received.

 Taxpayer Signature and Date