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“Plan For Success”

Office: (414) 321-0555

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## IMPORTANT

You will need to read and sign on the back of **this** page!

### Tax Year 2023

Dear Tax Client:

We are looking forward to serving you and we will be offering limited in-office appointments. Feel free to mail us your organizer and any supporting documents. We will also accept these documents by fax, online, or drop-off. A drop box is available on the front porch of our office for dropping off outside of office hours. Please use the lock inside the box to protect your information. The hours for in-office drop offs are as follows:

Monday – Thursday 8:00am - 5:00pm

Friday 8:00am – 4:00pm

Saturdays 9:00am - 2:00pm

Income tax time is just around the corner. This organizer has been prepared to assist you in gathering information to prepare your tax return for 2023. Please read this letter, review the **entire** checklist, and complete any questions that apply to you. **If you would like a preprinted organizer (same as large organizers sent to you in prior years), you can call our office and request that one be mailed to you.**

We will prepare your 2023 individual income tax returns from the information you provide to us in accordance with the appropriate income tax laws and regulations. It is your responsibility to provide us with all the information necessary to complete your tax return, and that all information is correct and complete to the best of your knowledge and belief. We may require clarification or additional information. We are not responsible for disallowed deductions or the inclusion of additional unreported income resulting in additional taxes, penalties, or interest.

**Our fees for the preparation of your returns will be billed at our standard rate: \$175 per hour with a minimum fee of \$275.00. Fees are due and payable upon presentation of your returns. We accept cash, check, money order, MasterCard, Visa, and Discover. An extra \$75.00 will be charged with the completion of forms for the Earned Income Credit and the Health Care Premium Assistance Tax Credit.**

Also, all Federal and State income tax returns for all clients will be filed electronically whenever possible. There will be no additional charge for filing electronically.

Instead of waiting for the government to send you your refund check, you may receive refunds by **direct deposit into your bank account**. In order to use direct deposit for your tax refund, we will need you to complete the following information. **We cannot include direct deposit information on your return after the return is completed; therefore we need this information when your paperwork is dropped off at our office.** You can find these numbers on the bottom of a check.

\*\*\*\*What is the name of the bank issuing the account? \_\_\_\_\_

\*\*\*\*Is the bank account a checking account or savings account? \_\_\_\_\_

\*\*\*\*What is the bank routing number? \_\_\_\_\_  
(9 digit number in bottom left corner of check)

\*\*\*\*What is the account number? \_\_\_\_\_

**\*\*PLEASE SIGN ON NEXT PAGE\*\***

**We must receive all information to prepare your tax return by March 16, 2024 to help ensure that your return will be completed by April 15, 2024. If we have not received all of your information by March 16, 2024 and your return is not completed by April 15, 2024, you may be subject to late filing or late payment penalties. We are not responsible for late filing and late payment penalties.**

If you have any questions about this letter or about the attached organizer, please call our office.

Sincerely,  
B.M.S. Management Services

**Please read the following statement and sign below.**

“I/We agree to the information stated in the above letter and, I/We have submitted this information for the sole purpose of preparing my/our tax return and related items and each item can be substantiated by receipts, canceled checks or other documents. This information is true, correct and complete to the best of my/our knowledge. If any disputes arise among the parties, I/we agree to try first in good faith to settle the dispute by mediation/arbitration. By agreeing to arbitration, I/we acknowledge that in the event of a dispute over preparation or fees, I/each of us is giving up the right to have the dispute decided in a court of law before a judge or jury and instead I/we are accepting the use of arbitration for resolution.”

Taxpayer's Signature \_\_\_\_\_ Date \_\_\_\_\_

Taxpayer's Name (please print) \_\_\_\_\_

Spouse's Signature \_\_\_\_\_ Date \_\_\_\_\_

Spouse's Name (please print) \_\_\_\_\_

**\*\*\*\*May the IRS/WI discuss your 2023 return with the preparer? YES \_\_\_\_\_ NO \_\_\_\_\_**  
(Question is asked as part of tax return - required)

Privacy Policy

We do not disclose any non-public personal information about our clients or former clients to anyone, except as instructed to do by such clients, or required by law. We restrict access to non-public personal information to those professionals (Internal Revenue Service) and we maintain physical, electronic, and procedural safeguards to guard your non-public information.