Slifko & Associates, Inc
Denice L Vitale
43219 Schoenherr Rd
Sterling Heights, MI 48313

Organizer Mailing Slip

Slifko & Associates, Inc.
Denice L. Vitale EA
43219 Schoenherr Rd.
Sterling Heights, MI 48313
(586) 731-5527
Fax (586) 731-5532

Enclosed is your Tax Organizer for tax year 2024.

When you are ready, please call our office and one of our helpful staff members can schedule your tax appointment. Your appointment options are: in person, phone and/or virtual appointments via zoom. If you prefer to not meet in person please make sure that we have your paperwork, either mailed, emailed, faxed, or dropped off, one week prior to your appointment. Due to rising postage costs we are continuing to send just this letter with the attached questionnaire instead of the full organizer. If you wish to have an organizer sent to you please contact our office. **Your options to receive your client copy of your tax return are electronic via our portal/secure link (This is a new option and must be set up through our website), on a flash drive or as a paper copy. Additional copies of your current year return after the initial copy will be available for an additional fee. Copies of prior year returns are available for $25.00 per return.**

We must have all necessary documents to complete your return by April 1, 2025 to guarantee a completed return by April 15th. If it becomes necessary to put your return on extension there will be a charge of $75.00. If you wish to be put on extension, please notify our office no later than April 12, 2025.

In order to e-file your return we must have a completed and signed engagement letter, payment for tax prepration services, and signed form 8879.

Add any notes or questions that will help us prepare a complete and accurate return. Also, add any questions or concerns you may have if you believe your tax situation may be changing in future years so we may help plan for those changes.

Due to the high volume of bank mergers and acquisitions you must provide us with your bank name, routing number, account number, and account type if you wish to have direct deposit for refunds or direct debit for any balance due.

If you answer "Yes" to any of the General Business and Investment questions, please provide detailed information with your answer.

When you arrive for your appointment, please bring this Questionnaire and/or Organizer and any of the following that apply to your tax situation:

- Last year's tax return (if not in our possession)
- Original Form(s) W-2
- Schedule(s) K-1 from partnerships, S-corporations, estates or trusts
- Information about contributions to a pension or other retirement plan if this is the first year you received income from the plan
- Form(s) 1099 or statements reporting dividend, interest, retirement or other income
- Broker statements providing details of capital gains transactions
- Form(s) 1098 and copies of real estate tax bills, etc.
- Legal documents pertaining to the sale or purchase of real property
- Form 1095-A **if you have insurance through the marketplace**

If you have any questions before your scheduled appointment, please give us a call.

Sincerely,

Denice L Vitale
taxes@slifko.com Website: slifko.com Facebook: @slifkoandassociates

PLEASE INITIAL BELOW THAT YOU HAVE READ AND AGREE TO THE TERMS AND CONDITIONS LISTED ABOVE

Slifko & Associates, Inc.
Denice L Vitale
43219 Schoenherr Rd
Sterling Heights, MI 48313

January 23, 2025

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Dear ,

Thank you for choosing our firm to prepare your income tax returns for tax year 2024 . This letter confirms the services we will provide.

Services Provided

We will prepare your federal and state returns for tax year 2024 based on information you provide. Although our work will not include procedures to discover irregularities or inaccuracies in the tax data you provide, we may ask for clarification of certain information, or additional information, so that we can prepare accurate and complete returns for you.

It is your responsibility to provide all necessary information related to income and deductions for tax year 2024, and to respond to our inquiries in a timely manner so that we are able to accurately complete your returns by the appropriate due dates.

You are responsible for maintaining appropriate records, such as official tax documents you receive, receipts and substantiation for your deductions, and purchase and sales information for assets.

It is your responsibility to review your returns before they are filed to determine that all income has been correctly reported and that you have substantiation for your deductions. Filing your returns by the due dates is your responsibility.

Other Work

If your returns are later selected for review or audit by taxing authorities, we will be glad to assist or represent you if you desire. Our fees for preparing your returns do not include time that might be necessary to assist you during a taxing authority review.

If, during our work, we discover information that affects prior-year tax returns, we will make you aware of the facts. However, we cannot be responsible for identifying all items that may affect prior-year returns. If you become aware of such information during the year, please contact us to discuss the best resolution of the issue. We will be happy to prepare appropriate amended returns as a separate engagement.

Our work in connection with the preparation of the tax return(s) does not include any procedures designed to discover defalcations or other irregularities, should any exist. The returns will be prepared solely from information provided to us without verification by us.

The Internal Revenue Code and regulations impose preparation and disclosure standards with non-compliance penalties on both the preparer of a tax return and on the taxpayer. Accordingly, we will discuss tax positions that may increase the risk of exposure to penalties and any recommended disclosures with you before completing the preparation of the return. If we concluded that we are obligated to disclose a position and you refuser to permit the disclosure, we reserve the right to withdraw from the engagement and you agree to compensate us for our services to the date of the withdrawal. Our engagement with you will terminate upon our withdrawal.

Record Retention and Confidentiality

In accordance with federal law, in no case will we disclose your tax return information to any location outside the United States, to another tax preparer outside of our firm for purposed of a second opinion, or to any third party for any purpose other than in preparing your return without first receiving your consent.

It is our policy to keep records related to this engagement for the minimum Internal Revenue Service statutory requirement. However, we do not keep any of your original records, so we will return those to you upon completion of the engagement. When records are returned to you, it is your responsibility to retain and protect the records for possible future use, including potential examination by governmental or regulatory agencies.

By signing this engagement letter, you acknowledge and agree that upon the expiration of the minimum Internal Revenue Service statutory requirement, we are free to destroy our records related to this engagement.

Certain communications involving tax advice are privileged and not subject to disclosure to the IRS. By disclosing the contents of those communications to anyone, or by turning over information about those communications to the government, you may be waiving this privlege. To protect this right to provileged communication, please consult with us or your attorney prior to disclosing any information about our tax advice. Should you decide that it is appropriate for us to disclose any potentially privileged communication, you agree to provide us with written, advance authority to make that disclosure. Should we receive any request for the disclosure of privileged information from any third party, includint a subpoena or IRS summons, we will notify you. In the event you direct us not to make the disclosure, you agree to hold us harmless from any expenses incurred in defending the privilege.

Payment Terms

Our fees for preparation of your returns are based upon our standard billing rates plus out-of-pocket expenses. Accordingly, you will save expense if you provide complete, accurate, and organized accounting records. The fee is payable upon completion fo the work, and is due before we will provide you with the return. We will notify you immediately of any circumstances we encounter that could significantly affect our normal fees and will not proceed without your consent. Our invoices are due and payable upon presentation.

We have the right to withdraw from this engagement, in our discretion, if you don't provide us with any information we request in a timely manner, refuse to cooperate with our reasonable requests or misrepresent any facts. Our withdrawal will release us from any obligation to complete your return and will constitute completion of our engagement. You agree to compensate us for our time and out-of-pocket expenses through the date of our withdrawal.

If this letter accurately summarizes your understanding of our agreement relating to the preparation of your tax returns, please sign the enclosed copy in the space indicated and return it to us.

Thank you again for choosing our firm to prepare your 2024 tax return. We appreciate your business.

Sincerely,

_____

Denice L Vitale

Accepted by:

_____ Date _____

_____ Date _____

REMEMBER

WE CANNOT e-FILE TAX RETURNS WITHOUT THE BELOW

1. COMPLETED AND SIGNED ENGAGEMENT LETTER
2. PAYMENT FOR TAX PREPARATION SERVICES
3. SIGNED E-FILE AUTHORIZATION FORM (8879)

Name _____ SSN _____

Questions

Personal Information

Yes	No		
☐	☐	1	Did any births, adoptions, marriages, divorces, or deaths occur in your family since last year?
☐	☐	2	Did you purchase or sell your principal residence or did your address change?
☐	☐	3	Are either you or your spouse being claimed (or are eligible to be claimed) as a dependent on anyone else's return?
☐	☐	4	Were you in a Registered Domestic Partnership, civil union or same-sex marriage during 2024?
☐	☐	5	Were either you or your spouse in the military or National Guard?
☐	☐	6	Have you been notified by the IRS or state of changes to a prior year's return, or received any other tax correspondence?
☐	☐	7	Have you or your spouse been an identity theft victim and given an identity theft protection six digit PIN by the IRS?
☐	☐	8	Electronic copy of return on flash drive - we provide the flash drive
☐	☐	9	Electronic copy of return via portal/secure link
☐	☐	10	Paper copy - Additional fees will be assessed if you elect more than one format.

Dependents

Yes	No		
☐	☐	1	Are there any changes in your dependents from last year?
☐	☐	2	Did you have any children under 19 (or 24 if a full time student) who received more than $1,300 in investment income?
☐	☐	3	Did you pay education expenses for your dependent children?
☐	☐	4	Did anyone in your family receive a scholarship of any kind during 2024?
☐	☐	5	Did you pay any dependent care expenses for a child or a parent?
☐	☐	6	Did you pay over half of the support for a parent or someone else you aren't claiming as a dependent?
☐	☐	7	Are all of your dependents either US residents or citizens?

Health Care Coverage

Yes	No		
☐	☐	1	Did you or a member of your family have health insurance through the marketplace? Contact the marketplace if you did not receive your 2024 1095-A form.

Income (In 2024, did you or your spouse have any of the following?)

Yes	No		
☐	☐	1	Wages? (include form(s) W-2)
☐	☐	2	Non-employee compensation? (include form(s) 1099-NEC)
☐	☐	3	Miscellaneous Income? (include form(s) 1099-MISC)
☐	☐	4	Interest income? (include form(s) 1099-INT)
☐	☐	5	Dividend income? (include form(s) 1099-DIV)
☐	☐	6	Did you receive any tax-exempt income, such as interest or dividends from municipal bonds or a mutual fund account?
☐	☐	7	Gambling income? (include form(s) W-2G). Be sure to include any gambling expenses.
☐	☐	8	Social security or Railroad Retirement benefits? (include form(s) SSA-1099 & RRB-1099)
☐	☐	9	Did you receive a state or local refund, or a refund of any other deduction you itemized in a prior year? (attach 1099-G)
☐	☐	10	Disability income? (include form(s) W-2 or 1099)
☐	☐	11	Unemployment compensation? (include form(s) 1099-G)
☐	☐	12	Alimony?
☐	☐	13	Did you receive tip income NOT reported to your employer?
☐	☐	14	Did you receive payments from a Long-Term Care insurance contract?
☐	☐	15	Did you barter your services for goods or services from someone else?
☐	☐	16	Did you receive, or expect to receive, a Schedule K-1 (or substitute K-1) from a trust, estate, partnership, or S corp?
☐	☐	17	Did you receive employer-provided adoption benefits for a previous year?
☐	☐	18	Did you cash in any U.S. savings bonds?
☐	☐	19	Did you make a loan to someone at an interest rate below market rate?
☐	☐	20	Did you receive a housing allowance for ministerial services you provided?
☐	☐	21	Did you receive any income not reported in this Organizer?
☐	☐	22	Did you own an interest in a Real Estate Mortgage Investment Conduit (REMIC)?
☐	☐	23	Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?

Foreign Reporting

Yes	No		
☐	☐	1	Did you have an interest in or signature authority over a financial account in a foreign country?
☐	☐	2	Were you the grantor of or transferor to a foreign trust?
☐	☐	3	Did you receive income from a foreign source or pay taxes to a foreign government?

Retirement & Other Plans

Yes	No		
☐	☐	1	Did you receive any distributions from a retirement plan? (Include form(s) 1099-R)
☐	☐	2	Did you rollover a retirement plan distribution into another plan?
☐	☐	3	Did you convert a traditional IRA to a Roth IRA?
☐	☐	4	Did you make a contribution to a retirement plan? (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
☐	☐	5	Did you receive a distribution from an Achieving a Better Life Experience (ABLE) savings account?

☐	☐	6	Did you receive a distribution from an HSA, Archer MSA or Medicare Advantage MSA (Include form(s) 1099-SA)
☐	☐	7	Did you make any contributions to an HSA (Health Savings Account) in 2024?
☐	☐	8	Did you receive a qualified disaster distribution in 2024?
☐	☐	9	Did you receive an early distribution for a qualified birth or adoption distribution?

Purchases, Sales, Gains and Losses

Yes	No		
☐	☐	1	Did you exchange any securities or investments for something other than cash?
☐	☐	2	Do you have any short sales, commodity sales, or straddles?
☐	☐	3	Did you receive Form 2439?
☐	☐	4	Did you buy or sell any bonds?
☐	☐	5	Did you receive stock from a stock bonus plan with your employer?
☐	☐	6	Did you sell any other personal assets at a gain?
☐	☐	7	Did you sell any real estate (other than your home) during the year?
☐	☐	8	Did you sell any assets using the installment method?
☐	☐	9	Did you receive proceeds from a prior year installment sale?
☐	☐	10	Did you purchase a rental property?
☐	☐	11	Did you exchange any property for other property?
☐	☐	12	Did you incur a loss because of damaged or stolen property?
☐	☐	13	Did you purchase a new vehicle, aircraft or boat?
☐	☐	14	Did any security become worthless during 2024?
☐	☐	15	Did any debts become uncollectible during 2024?
☐	☐	16	Did you puchase any items acquired out of state, online or by mail order that did not include sales tax?

Business and Rental Property Income & Deductions

Yes	No		
☐	☐	1	If you own rental property, do you qualify as a Real Estate Professional?
☐	☐	2	Did you start or acquire a new business?
☐	☐	3	Did you sell any part of an existing business, or sell business assets?
☐	☐	4	Did you cease operating any business or rental property?
☐	☐	5	Did you remove any of your business assets for personal use?
☐	☐	6	Did you use part of your home for business purposes?
☐	☐	7	Did you make any contributions to a Keogh or a self-employed SEP plan for 2024?
☐	☐	8	Do you pay for any health or long term care insurance through your business?
☐	☐	9	If you or your spouse are self-employed, are either of you covered under an employer's health plan?
☐	☐	10	Did you purchase any furniture or equipment for your business?
☐	☐	11	Did you make any improvements to your rental properties?
☐	☐	12	Did you receive income from raising animals or crops?

Other Deductions

Yes	No		
☐	☐	1	Did you use your car on the job (other than to and from work)?
☐	☐	2	Did you work out of town for part of the year?
☐	☐	3	Did you incur unreimbursed expenses working as a reservist, performing artist, or fee-basis gov't official?
☐	☐	4	Did you incur any travel and entertainment expenses for business purposes?
☐	☐	5	Did you pay expenses for the care of your child or other dependent so you could work?
☐	☐	6	Did you purchase a 'clean fuel' or electric hybrid vehicle in 2024?
☐	☐	7	Did you make energy efficient improvements to your home or purchase any energy-saving property during 2024?
☐	☐	8	Did you contribute less than an entire interest in any property to charity?
☐	☐	9	Did you refinance a mortgage or take out a home equity loan during 2024?
☐	☐	10	Did you incur moving expenses during the year due to a military order and incident to a permanent change in station?
☐	☐	11	Did you or your spouse pay any educational expenses for yourselves?
☐	☐	12	Did you pay any student loan interest?
☐	☐	13	Did you make any federal or state estimated payments?
☐	☐	14	Did you pay alimony?
☐	☐	15	Did you donate non-cash donations?
☐	☐	16	Did you donate a vehicle?

Miscellaneous

Yes	No		
☐	☐	1	Did you make gifts of more than $18,000 to any one person?
☐	☐	2	Did you engage the service of any household employees?
☐	☐	3	Did your bank account information change within the last twelve months?

Yes	No		
☐	☐	4	Do you want to allocate $3 to the Presidential Election Campaign Fund?
☐	☐	5	Does your spouse want to allocate $3 to the Presidential Election Campaign Fund?
☐	☐	6	Did you file Form 8839, Adoption Credit, in a previous year or incur adoption expenses in 2024?
☐	☐	7	Did you claim a First-time Homebuyer Credit for a home purchased in 2008?
☐	☐	8	Was there a disposition or change in use of your main home for which you claimed the First-time Homebuyer Credit?

Return preparation and filing

Yes	No		
☐	☐	1	Do you want to e-file your return?
		2	If you are due a refund, how do you want to receive it?

☐ Check sent to you in the mail

☐ Apply to next year's estimates

☐ Direct deposit (please provide voided blank check)

☐ Other quick refund via a bank product

☐

Type of account: ☐ Checking ☐ Savings

If you owe taxes, how do you want to pay them?

☐

☐ Paper check sent with my return ☐ Credit card

☐ Direct debit (please provide a voided blank check)

☐ Installment Agreement

Type of account: ☐ Checking ☐ Savings

☐ ☐ 3 Do you want to allow your tax preparer to discuss this year's return with the IRS?
If no, enter another person (if desired) to be allowed to discuss this return with the IRS:

Designee's name _____ Phone Number _____ Personal identification Number (5 digit PIN) _____

Name _____ SSN _____

Comments