



Cleveland Business Services ★ 2407 Georgetown Road NW, Cleveland, TN 37311 ★ 423-868-2937 ★ www.cbstn.net

FOR ADMINISTRATIVE USE ONLY	DROP-OFF DATE: _____ / _____ / _____	TAX YEAR: _____
CLIENT ACCOUNT: _____		SMS: _____

## TAX FILING WORKSHEET

All information provided is confidential and will be utilized for tax preparation purposes only.

### FILING STATUS (Please choose only one)

- Single
- Married Filing Jointly
- Married Filing Separate
- Head of Household

### TAXPAYER INFORMATION

Full Legal Name: \_\_\_\_\_  
 SSN: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
 Phone: \_\_\_\_\_ Email: \_\_\_\_\_  
 IPPIN (6 digit code from IRS): \_\_\_\_\_ Occupation: \_\_\_\_\_  
 Driver's License Number: \_\_\_\_\_  
 State Issued: \_\_\_\_\_ Issue Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ Expiration Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

### SPOUSE INFORMATION

Full Legal Name: \_\_\_\_\_  
 SSN: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
 Phone: \_\_\_\_\_ Email: \_\_\_\_\_  
 IPPIN (6 digit code from IRS): \_\_\_\_\_ Occupation: \_\_\_\_\_  
 Driver's License Number: \_\_\_\_\_  
 State Issued: \_\_\_\_\_ Issue Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ Expiration Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

### MAILING ADDRESS

Home Address (No PO Box): \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
 Home Phone: \_\_\_\_\_ Alternate Phone: \_\_\_\_\_

### REFUND ISSUED AS:

- Direct Deposit
- Check By Mail
- For Direct Deposit Only
- Checking
- Savings

Bank Name: \_\_\_\_\_  
 Routing Number: \_\_\_\_\_ Account Number: \_\_\_\_\_

### ADDITIONAL INFORMATION (Please select any that apply)

- Self-Employed (Landscaper, Uber Driver, Etc.)
- Small Business Owner / LLC
- Landlord (Rental Property)
- Sold Stocks
- Paid Alimony
- Armed Forces Reservist
- Government Official
- Entertainer/Performing Artist

**IS THERE ANYTHING ELSE WE SHOULD KNOW?** (Feel free to include any questions or comments)

---

---

---

---

---

---

---

---

---

---

---

**HOW WOULD YOU LIKE YOUR RETURN?**

\_\_\_\_\_ I want my documents printed and present for a charge of \$10 per return / per year. **(Drop offs only)**

\_\_\_\_\_ For no charge, I want my documents emailed in PDF format to the following email address:

---

By signing this document, you are acknowledging that all information provided is true and accurate. I understand that if any of the information provided to Cleveland Business Services is discovered to be false, inaccurate, or disproportionate in any manner, that Cleveland Business Services shall be held harmless as a reporter of information provided. I take responsibility for providing all tax documents for processing and preparation. This is also an acknowledgement of consent to provide tax preparation including e-file transmission to IRS for federal and state filing. I acknowledge payment to be provided by payment at time of service. I understand that services for tax preparation only include the actual preparation of the tax return.

**Taxpayer Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

**Spouse Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

**PLEASE NOTE:** For drop-off service; your tax preparer will communicate with you via text using number 423-295-8995

Thank you for choosing us for your tax preparation needs!  
Please let us know how we can serve you and improve our business.  
Also, please let others know about us! We love your referrals!

**For any and all tax related questions, please call 423-868-2937 or text 423-295-8995.**



★ 2407 Georgetown Rd NW, Cleveland TN 37311 ★ (423)-868-9237 ★ [www.cbstn.net](http://www.cbstn.net) ★

### Tax Services Disclaimer

Thank you for choosing Cleveland Business Services to assist you with your 2024 tax filings. This letter outlines the nature and extent of the services provided by our company. Please read this letter to understand the exact terms of your engagement with us.

We will prepare your 2024 federal and state income tax returns for you. If you are not a bookkeeping client of Cleveland Business Services, we will depend on you to provide any and all necessary information to file your tax return as accurately as possible. Cleveland Business Services will not audit or verify the accuracy of the data submitted from you.

We will provide the necessary accounting services, as needed, to prepare your tax return. The work conducted will not include any procedures to find irregularities or misappropriation of funds and expenses. Our engagement should not be relied upon to disclose any errors, fraud, or other illegal acts, though Cleveland Business Services may clarify submitted information.

The law imposes penalties to taxpayers when they underestimate their tax liability. Reach out to us via text, phone, or email for any questions or concerns regarding these penalties.

Our fee for filing your return has a base starting price of \$40.00. The price increases due to what forms are necessary to file with a standard 1040 tax return. Any hourly work performed to get necessary expense totals for any self-employment business will also be included on your final invoice. For every fifteen (15) days your invoice goes unpaid, an interest penalty will be charged to your invoice.

*Your invoice total must be paid in-full before your return will be filed through Cleveland Business Services to the IRS.*

All original documents will be returned to you at the end of this engagement. Be sure to safely store these records, along with any supporting documents, in a secure location. Cleveland Business Services will retain copies of your original paperwork and of your tax return for up to seven years, after which these documents will be destroyed.

Tax returns will only be submitted to the IRS from Cleveland Business Services upon receiving your signature and payment upon completion. Please review your return carefully before providing your signature allowing our office to either e-file or paper file your return. Our engagement will be concluded upon receiving your signature, invoice payment, and tax return delivery to the IRS.

Please sign this letter in the signature space provided below indicating that you understand the terms of the engagement with Cleveland Business Services.

Thank you for giving our office the opportunity to be of service!

Sincerely,



James Cole  
Owner  
Cleveland Business Services

By signing below, you are agreeing to all the terms for mentioned in this tax services disclaimer

Signed By:

---

Taxpayer Print Name

---

Taxpayer Signature

---

Date

---

Spouse Print Name

---

Spouse Signature

---

Date