INFINITY
WEALTH MANAGEMENT, INC.

3400 Sweeten Creek Road, Suite A
Arden, NC 28704

(Tel) 828.681.8574
(Toll Free) 800.557.5172
(Fax) 828.676.2655

www.infinitywealthmanagementinc.com

2023 INTAKE FORM

Failure to provide the below information may delay the processing of your return

1. Changes to your address, phone, email, dependents, or filing status? ◯ YES ◯ NO
   Please note changes herein:

2. Are you a new client? ◯ YES ◯ NO
   If yes, please complete the reverse side of this form.
3. Are you claiming dependents? ◯ YES ◯ NO
   If yes, request a required DUE DILIGENCE FORM.
4. Are you claiming an Earned Income Credit without dependents? ◯ YES ◯ NO
   If yes, request a required EIC FORM.
5. Do we have current copies of your/spouse's Driver Licenses or State ID? ◯ YES ◯ NO
   If not, please provide copies or request DL FORM.
6. Did you make 2023 Estimated Tax Payments to IRS or any State? ◯ YES ◯ NO
   If yes, provide details.
7. Do you want tax refunds (if applicable) Directly Deposited into your bank account? ◯ YES ◯ NO
   If yes, is your bank info on your prior year return correct? ◯ YES ◯ NO
   If not on file, please provide a cxld check OR bank name, routing number, and account number below.
8. Were you impacted by the TD Ameritrade/Schwab merger? If so, be sure to provide 1099 forms from both TD Ameritrade and Schwab.
9. Did you have any significant changes compared to last year (ex. death in family, home sale, new business income, etc)? If so, please note below.

CLIENT COMMENTS/QUESTIONS

Please note any comments or questions you'd like to address to your tax preparer

FOR NEW CLIENTS ONLY

PRIMARY TAXPAYER INFO	SPOUSE INFO
Name:	Name:
Soc Sec #:	Soc Sec #:
Date of Birth:	Date of Birth:
Email Address:	Email Address:
Primary Phone:	Primary Phone:

ADDRESS:

NOTES FOR PREPARER: Please note if the taxpayer, spouse, or any dependent is blind or disabled. If spouse died in 2022, please note date of death.

Filing Status: ◯ Single ◯ Married Filing Jointly ◯ Married Filing Separately

◯ Head of Household ◯ Qualifying Widower w/ Dep Child

Taxpayer's Occupation: ____

Spouse's Occupation: ____

2023 MISCELLANEOUS INFORMATION

Infinity Wealth Management, Inc. D/B/A Infinity Tax Advisors strongly encourages all clients to diligently complete this information collecting form in an effort to ensure that all relevant data is collected. It is the taxpayer's responsibility to provide complete and accurate information. Please indicate your understanding by signing and dating herein.

Signature: **Date:**

Personal/Dependent Information		
Yes	**No**	Did you have any childcare or adoption expenses during the year? If "Yes," provide details.
Yes	**No**	Did you have any children under age 19 or a full-time student under age 24 with more than $1,250 of unearned income?
Health Care Information		
Yes	**No**	Did any member of your household have healthcare coverage through the Marketplace? If so, please provide copy of Form 1095-A.
Yes	**No**	Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA during the year?
Income, Retirement, Purchases, Sales, and Debt Information		
Yes	**No**	Did you receive any withdrawals from or make contributions to any of the following? IRA, Roth, Keogh, SIMPLE, SEP, 401(k), myRA, or other qualified retirement plan during the year? Provide Form 1099.
Yes	**No**	Did you receive any Pension, Social Security benefits or taxable disability income during the year? Provide Form 1099.
Yes	**No**	Did you buy or sell any stocks, bonds, or other investments outside of your qualified accounts or cash US savings bonds during the year? Please provide applicable 1099 forms.
Yes	**No**	Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currencies?
Yes	**No**	Did you receive income or incur expenses associated with any of the following: Lyft, Uber, Freelancing, Fantasy sport league, Fashion Sharing (ex Poshmark), Crowdfunding, Tips not reported to employer, or Gambling? If so, please provide additional information.
Yes	**No**	Did you receive income or incur expenses associated with a short-term rental (ex Airbnb or HomeAway)? Did you rent your home or use it for business? If so, please provide relevant information.
Yes	**No**	Did you receive any other income not indicated herein?
Yes	**No**	Did you acquire new or additional interest in a partnership or S corporation?
Yes	**No**	Did you have any debts cxld or forgiven this year or does anyone owe you money that has become uncollectible?
Yes	**No**	Did you purchase a new hybrid, alternative motor, or electric motor energy-efficient vehicle or make energy-efficient improvements to your home during the year?
Itemized Deduction Information		
Yes	**No**	Did you pay out-of-pocket medical expenses during the year for yourself, spouse, or a dependent (ex. long term care insurance premiums, dental expenses, prescriptions, or mileage)?
Yes	**No**	Did you receive any state or local income tax refunds from prior years? Existing tax clients need not answer.
Yes	**No**	Did you pay any mortgage interest, real estate property taxes or personal taxes during the year?
Yes	**No**	Did you make cash or non-cash donations to charity during the year or donate a boat or vehicle to a non-profit?
Yes	**No**	Did you make any major purchases (vehicle, boat, etc.) during the year?
Education Expenses		
Yes	**No**	Did you pay tuition expenses for yourself, your spouse, or a dependent during the year?
Yes	**No**	Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition Program during the year?
Yes	**No**	Did you pay student loan interest for yourself, your spouse, or your dependent(s) during the year?
Miscellaneous Information		
Yes	**No**	Did you incur a gain or loss due to damaged or stolen property?
Yes	**No**	Did you pay wages to any household employees (babysitter, nanny, housekeeper, etc.)?
Yes	**No**	Did you make gifts to any one person in excess of $17,000 during the year?
Yes	**No**	Did you incur moving expenses related to a military service transfer during the year?
Yes	**No**	Are you a business owner who paid health insurance premiums for your employees during the year?
Yes	**No**	Did you apply an overpayment of your 2022 taxes to your 2023 estimated taxes?
Yes	**No**	If you have an overpayment of 2023 taxes, do you want the refund applied to your 2024 estimated taxes?
Foreign Account Information		
Yes	**No**	Did you have a financial interest in/or signature authority over a financial a/c asset located in a foreign country?
Yes	**No**	Did you receive a distribution from, or were you a grantor of, or transferer to, a foreign trust?
Yes	**No**	Did you own property in a foreign country?
Yes	**No**	Did you have any income from, or pay taxes to, a foreign country outside of your brokerage accounts?
Yes	**No**	Did the aggregate value of your foreign accounts exceed $10,000 at any time during the year?

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CLIENT AGREEMENT AND ENGAGEMENT LETTER

TAX FEE SCHEDULE EFFECTIVE 1/2/24

Individual tax returns have a base fee of $299 through 7/1/24. After 7/1/24 the base price increases to $399. After 9/1/24 the base rate increases to $499. We have replaced the Senior Discount with a $50 Early Bird Discount for all filers through March 15, 2024. We now offer a year-round $150 Highschool/College Student Discount. Discounts cannot be stacked. Corporate, Trust and Estate returns have a base rate of $595. Additional charges may apply to any return.

Additional charges may include (non-comprehensive list):

- Affordable Care Act Reconciliation: Minimum $25 each
- Additional state return: Based on complexity, minimum $50
- Amended tax returns with no TPP: Minimum $149/Additional charges if we must key the return
- Clergy: Minimum $100
- Dependents qualifying for tax credits: Minimum $10 each if in our 2022 system - $25 for new dependents
- Misc Credits (Earned Income, American Opportunity, Savers, Etc): Minimum $25
- Schedule A Itemized Deductions: Minimum $50
- Schedule C Profit or Loss from Business: Minimum $75 each (1st year minimum $100)
- Schedule D Capital Gains and Losses: (Form 1099-B) Extensive wash sales/uncovered sales/multiple brokerage statements may result in additional charges.
- Schedule E Supplemental Income (Rental Properties): Minimum $75 per rental (1st year minimum $100)
- K-1's: Minimum $10 each if already in our system/minimum $25 each if new forms
- Bookkeeping: Prorated at $99/hour
- Business, Trust and Estate returns: Based on complexity, minimum $595
- Rerun Fee: $50 if no fault of Infinity
- Tax Protection Plan: Minimum $29 Individual and $54 Corporate
- Extensions: No charge unless payment vouchers needed/$75 if payment vouchers requested
- Prior year returns: Minimum $499
- Tax notice review and response with no TPP: $199/hour
- Additional copy of tax return: $15 (including electronic copy)
- Copy of supporting documentation: $15 per year

In order to complete the above referenced tax preparation services, you will be asked to provide certain information. It is your responsibility to ensure that the information provided is complete and accurate. The rendered services do not include verification of the information that you provide. It is also your responsibility to maintain records of this information as you may need to satisfy tax authority inquiries.

If you bring in new or revised information after your taxes have been through final review, yet prior to e-filing, you agree to pay Infinity Wealth Management, Inc. an additional $50 to process the rerun. Infinity Wealth Management, Inc. will not e-file your returns without your signed consent and payment in full for the tax preparation services provided.

Your tax return will be filed electronically whenever possible to allow faster processing by the IRS. It is your responsibility to review for accuracy and notify Infinity Wealth Management should you have any questions or changes to your return.

NOTE: Joint returns require both spouses to pick up the tax return and sign the IRS e-file forms.

Client Signature: ________________________________ Print Name: ________________________________ Date: __________

Client Signature: ________________________________ Print Name: ________________________________ Date: __________