

Morgey Accounting, LLC

166 La Cascata, Clementon, NJ 08021
kjmorsey@comcast.net (856) 435-0070
www.morgeycpa.com

2019 TAX SERVICE WORKSHEET & AGREEMENT

Welcome to Morgey Accounting! Please **complete** both sides of this sheet **and gather** the requested documents. You can contact me to arrange a **drop off** appointment, **mail** the information, **or email** me at kjmorsey@comcast.net for a link to my secure portal (it's easy to upload).

I look forward to working with you.

Name(s): _____

Occupation(s): _____

Phone: _____ - _____ - _____ e-mail: _____

Did you have health insurance coverage for the full year? ____ yes ____ no

Direct Deposit or ACH Payment: ____ checking ____ savings ____ no thank you

Routing #: _____ Account #: _____

Use for refunds ____ yes ____ no Use for payments ____ yes ____ no

Please Enclose (as applicable):

____ This worksheet (complete both sides for \$10 off your tax return)

____ A **copy of your 2018 tax return** (or full name and social security numbers for all dependents)

____ All **IMPORTANT TAX DOCUMENTS***

- ◆ W-2s (wages, gambling winnings)
- ◆ 1095s (health insurance info)
- ◆ 1098s (mortgage, student loan or tuition payments)
- ◆ 1099s (other income like interest, subcontract pay, or sales proceeds)
- ◆ K-1s (income from owning a business)

*Note: Missing **IMPORTANT TAX DOCUMENTS** will likely result in a tax notice and additional billable work.

____ Is this deductible? Please include related documents & we'll see what we can do.

____ I accept the terms as explained on the enclosed 2019 Tax Service Agreement

Taxpayer Signature: _____ date: ____/____/____

Spouse Signature (if applicable): _____ date: ____/____/____

Morgey Accounting, LLC

www.morgeycpa.com

Happy Birthday

Date of birth for: Taxpayer ___/___/___ Spouse ___/___/___

Dependents: _____ /___/___ _____ /___/___
_____ /___/___ _____ /___/___

2019 was a wonderful year

Please check everything that you did in 2019:

___ I/We moved or bought a new home on ___/___/___

New Address: _____

___ I/We paid rent \$ _____

___ I/We bought or sold something big (expensive)

___ I/We opened a business

___ I/We got married or divorced ___/___/___

___ Someone moved in with me/us

___ My/Our child started daycare

___ I/We paid college tuition for _____

___ I/We gave to charities \$ _____

___ I/We paid medical expenses \$ _____

I/We need to tell you more: _____



2020 will be even better

Please deliver my 2020 tax worksheet by ___ e-mail OR ___ postal mail

My/Our Financial Goal for 2020 is (optional): _____

**Complete this page and include with your tax information for
\$10 OFF YOUR TAX RETURN**