

Please help us better serve you. Kindly complete and submit with all your tax documents. Thank you.

Name(s) on Tax Return \_\_\_\_\_ Spouse \_\_\_\_\_
Last Name, First Name

Street Address \_\_\_\_\_ Apt # \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Daytime Phone \_\_\_\_\_ Spouse Daytime Phone \_\_\_\_\_

Evening Phone \_\_\_\_\_ Spouse Evening Phone \_\_\_\_\_

Cell Phone \_\_\_\_\_ Spouse Cell Phone \_\_\_\_\_

Date of Birth \_\_\_\_\_ Spouse's Date of Birth \_\_\_\_\_

Occupation \_\_\_\_\_ Spouse's Occupation \_\_\_\_\_

Email Address \_\_\_\_\_ Spouse's Email Address \_\_\_\_\_
(required for E-Filing)

Have you moved in the last year? ..... NO YES
Are there any new dependents? ..... NO YES
Are there any dependents you are no longer claiming? ..... NO YES

Did you collect NYS unemployment in 2024? ..... NO YES
Have you traded any cyber currencies? ..... NO YES
Have you (or an entity of which you are an owner) been convicted of an offense, defined in New York State Penal Law Article 200 or 496, or section 195.20? (REQUIRED FOR NY IT-201/203-ATT FILERS) ..... NO YES
Would you be interested in being contacted by our Financial Advisor, Ed O'Neill Jr. regarding a post-tax season financial review?.....NO YES

How would you like your tax return sent to you when completed? Portal only
(Please call or email and request a SecureFilePro portal)

Would you like a review session after your tax return is complete?.....NO YES
If yes, please indicate meeting preference.....Zoom / Teleconference

Kindly complete and submit this document with a copy of a voided check, clear copy of the front and back of your driver's license and your spouse's driver's license along with the Letter of Engagement.

Please note: Documents will NOT be returned at the end of the season. Kindly upload clear copies of all tax documents to the portal. Thank you

1400 Old Country Road, Suite 316, Westbury, NY 11590

www.EdONeillTaxes.com



Office@EdONeillTaxes.info



516.935.7771



516.822.6704

Please do not cut or staple documents. Do NOT send original documents. Keep them for your records. Clear Photocopies ONLY please

**CONSENT TO DISCLOSURE OF TAX RETURN INFORMATION**

I would like to thank you for your trust in me as your Accountant. The relationship we have built is truly something I truly appreciated. Helping you navigate the complexities of the tax code and keep more of the money you have earned is incredibly rewarding. But there may be more we can plan together.

As you may know, I have over 20 years of experience in multi-generational wealth management helping families develop sound retirement strategies and achieve financial well-being in all stages of their lives. Whether you are in retirement or preparing for retirement, seeking education, financial planning or looking for investment advice, I can help identify your needs to help you achieve your goals and dreams. I am an independent financial advisor with Cetera Financial Specialists LLC.

What sets me apart from most financial advisors is my extensive expertise as a tax professional. I would like to meet with you to discuss potential tax strategies that can reduce your tax liability and enhance your overall financial position. Please call 516-935-7771 to schedule a meeting.

Federal law requires this consent form to be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

If you would like Ed O'Neill Ltd. to disclose your tax return information to EON Wealth Management, please check the corresponding box for the service in which you are interested, provide the information requested and sign and date your consent to disclosure of your tax return information.

I authorize Ed O'Neill Ltd. to disclose to EON Wealth Management that portion of my tax return information for 2024 and future tax returns that is necessary for EON Wealth Management to contact me.

If you approve use of your tax return information by Ed O'Neill Ltd. for a term of one year or (duration of consent) \_\_\_\_\_ years, please sign below.

Taxpayer Signature \_\_\_\_\_ Spouse's Signature \_\_\_\_\_

Print name(s): \_\_\_\_\_ Date: \_\_\_\_\_

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).



**2024 PERSONAL LETTER OF ENGAGEMENT**

Dear Client:

Thank you for choosing Ed O'Neill Ltd. to assist you with your 2024 taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your 2024 federal and state income tax returns. You "the client" must provide the information needed to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. An Organizer will be provided, if needed, to help you collect the data required for your return. Please notify us if an Organizer is needed, and we will promptly upload it to your portal.

We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will inform you of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate their tax liability. Please call us if you have concerns about such penalties.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Our fee will be based on the forms required at standard billing rates plus out-of-pocket expenses. Invoices are due and payable upon presentation. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days.

You should secure your tax records, along with all supporting documents, canceled checks, etc., as these items may later be needed to prove accuracy and completeness of a return. We will retain copies of your tax returns for four years, after which these documents will be destroyed.

Our engagement to prepare your 2024 tax returns will conclude with the delivery of the completed returns to you (if paper filing) or your signing, and the subsequent submittal, of your tax return (if e-filing). If you have not selected to e-file your returns with our office, you will be solely responsible for filing the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please print and sign the enclosed copy of this letter in the space indicated and return it to us.

We appreciate your confidence in us. Please call if you have questions.

Sincerely,

Edward O'Neill

(Both spouses must sign for preparation of joint returns.)

Taxpayer Signature **X** \_\_\_\_\_ Spouse's Signature **X** \_\_\_\_\_

Please Print Name(s) on Tax Return \_\_\_\_\_ Date \_\_\_\_\_

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