

Fisk A+ Accounting and Tax

85 Sugar Creek Lane Ste A

North Liberty, IA 52317

admin@aplusaccg.com

Phone: (319)409-7416 | Fax: (800)882-6301

January 16, 2026

Subject: Preparation of Your 2025 Tax Returns

Thank you for choosing Fisk A+ Accounting and Tax to assist you with your 2025 taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

Below you will find the 2025 tax organizer. This has been prepared to assist you in gathering information for your 2025 tax return. Please use this organizer as a resource to gather your tax information only if you prefer not to complete our online tax organizer via StanfordTax. If you prefer a physical in-person process, this is for you!

We will prepare your 2025 federal and state income tax returns. We will depend on you to provide the information we need 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.

We will return your original records to you at the end of this engagement. Store these records, along with all supporting documents, in a secure location. We retain copies of your records and our work papers from your engagement for up to seven years, after which these documents will be destroyed.

If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them. Our engagement to prepare your 2025 tax returns will conclude with the delivery of the completed returns to you, or with e-filed returns, with your signature and our subsequent submittal of your tax return.

Invoices are due and payable upon presentation of completed tax returns.

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

Thank you for the opportunity to be of service. If you have any questions, contact any of our offices at 319-409-7416 (North Liberty), 319-390-7910 (Cedar Rapids), or 319-739-2100 (Robins).

Sincerely,

Fisk A+ Accounting and Tax

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

Accepted By:

Taxpayer

Spouse

Date

Fisk A+ Accounting and Tax

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Your privacy is important to us. Read the following privacy policy.

We collect nonpublic personal information about you from various sources, including:

- * Interviews regarding your tax situation
- * Applications, organizers, or other documents that supply such information as your name, address, telephone number, Social Security Number, number of dependents, income, and other tax-related data
- * Tax-related documents you provide that are required for processing tax returns, such as Forms W-2, 1099R, 1099-INT and 1099-DIV, and stock transactions

We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as requested by our clients or as required by law.

We restrict access to personal information concerning you, except to our employees who need such information in order to provide products or services to you. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your personal information.

If you have any questions about our privacy policy, contact our offices at 319-409-7416 (North Liberty), 319-390-7910 (Cedar Rapids), or 319-739-2100 (Robins).

Sincerely,

Fisk A+ Accounting and Tax\

2025 Tax Organizer

Personal Information

Personal Information

Name		SSN	Has IP PIN	Date of Birth
Taxpayer				
Spouse				
Name of person to whom all information should be addressed, if not the taxpayer				
Street address, city, state, and ZIP				
Occupation		Daytime Phone	Evening Phone	Cell Phone
Taxpayer				
Spouse				
Taxpayer email				
Spouse email				

Filing status at the end of 2025

Single Married Widowed - If widowed and your spouse died after December 31, 2023, enter the date of death _____

Married filing separately - If married but filing separately, did you live apart from your spouse for the last six months of 2025? _____

Yes No

- Are you or your spouse blind?
- Are you or your spouse disabled?
- Are you or your spouse a full-time student?
- Do you or your spouse want to designate \$3 to go to the Presidential Election Campaign Fund?
- At any time during 2025 did you:
 - (a) receive (as a reward, award, or payment for property or service) a digital asset?
 - (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

Identification Information

Taxpayer's type of photo ID

Driver's license State-issued photo ID

Photo ID number _____

State photo ID was issued _____

Date photo ID was issued _____

Date photo ID expires _____

Spouse's type of photo ID

Driver's license State-issued photo ID

Photo ID number _____

State photo ID was issued _____

Date photo ID was issued _____

Date photo ID expires _____

Account Information for Deposits and Withdrawals

Name of Bank	Bank Routing Number	Bank Account Number	Type of Account		Use this Account for	
			Checking	Savings	Deposits	Withdrawals

Appointment Information

Your 2025 appointment is scheduled for _____

Dependent and Other Information

Name:

SSN:

Dependent Information

First and Last Name SSN	Has IP PIN	Relationship	Months in Home	Date of Birth	Disabled	Full- time Student	Childcare Expenses

List dependents required to file a return _____

Child and Other Dependent Care Expenses

Name of Care Provider	Address	SSN or EIN	Amount Paid

Estimates

	Federal		Resident State		Resident City	
	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount
Overpayment applied from 2024						
First quarter						
Second quarter						
Third quarter						
Fourth quarter						
Additional payments						

Expenses Related to Business

Name:

SSN:

Auto Expense

Name of business vehicle is used for _____

Description of vehicle _____ Date vehicle was placed in service _____

Yes No

Was this vehicle available for use during off-duty hours?
 Was another vehicle available for personal use?

Yes No

Do you have evidence to support your deduction?
 If "Yes," is the evidence written?

Mileage

Number of miles the vehicle was driven during 2025

Business Other

Commuting

Expenses

Garage rent

Repairs

Gas

Tires

Insurance

Tolls

Licenses

Lease addback

Oil

Other expenses

Parking fees

.....

Rental fees

.....

Interest

.....

Property tax

.....

Business Use of Home

Name of business home is used for _____

What is the total square footage of your home that was used regularly and exclusively for business? _____

What is the total square footage of your home? _____

For daycare facilities not used exclusively for business, complete the following questions

How many days during the year was the area used? _____

How many hours per day was the area used? _____

 The daycare facility was in operation for the entire year**Expenses****Office expenses****Home expenses**

Mortgage interest

In the "Office expenses" column,

Real estate taxes

enter those expenses that

Excess mortgage interest

pertain exclusively to your office;

Excess real estate taxes

in the "Home expenses" column,

Insurance

enter those expenses that

Rent

pertain to the entire dwelling.

Repairs & maintenance

Utilities

Other expenses

Income

Name: _____

SSN:

Form 1099-MISC Income

Provide all copies of Form 1099-MISC

2025
Amount

Form 1099-NEC Income

Provide all copies of Form 1099-NEC

2025
Amount