TAX ACCOUNTANTS
BUSINESS CONSULTANTS

Dear Client,

It's that time again! Please carefully review the documents included in this organizer. On the **Organizer Checklist**, if you answer "**yes**" to the question, the column to the very right will specify what form you need to locate. Most of these forms will have been emailed or mailed to you before the tax season.

Additionally, we have created some spreadsheets for small business/rental property owners that can be found in our website to aid in compiling the more complex data. The Non-Cash Charitable contributions spreadsheet is also found in our website, www.wellstax.com.

Remember to please upload to the Smart Vault, or drop off all your documents, at least a week prior to your tax appointment. You can also mail them directly to our office at 7300 France Ave S, Ste 215, Edina MN 55435 with enough time to arrive at least a week prior to your appointment. Our aim is to have as much data entered in our system before your appointment, so that when you meet with us, we can focus on the review and outcome and provide valuable advice for planning ahead. A team member will reach out to you to make sure we have all the information.

Looking forward to working with you!

Warm regards,

WSH Team

2025

Engagement Letter

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements.

We will prepare your Federal and State income tax returns from information which you will furnish to us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. We have provided you a questionnaire as a guide in gathering your information, and to assist in keeping fees to a minimum.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all documents, canceled checks, and other data that form the basis of your returns. These may be necessary to prove the accuracy and completeness of the returns if audited. You have the final responsibility for the income tax returns, therefore, you should review them carefully before you sign or authorize the transmittal of them.

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations and or irregularities, should any exist. We will render such accounting or bookkeeping assistance as determined to be necessary for preparation of the income tax returns.

Although the firm may express an opinion about the possible results regarding the outcome of client's matter, the firm cannot guarantee any particular result. You acknowledge that the firm has made no promises about the outcome of any matter and has made no promises about the outcome of any matter.

Your returns may be selected for review by the taxing authorities. In the event of a government tax examination, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred.

You as client for yourself and your heirs, executors, administrators, successors and assigns, hereby waive, discharge, covenant not-to-sue, and release the firm and its employees and principals from any and all liability, causes of action, claims, judgments, costs, expenses (including attorneys' fees and court costs) and demands of any kind or nature, either at law or in equity, which arise or may hereafter arise from services provided by the firm.

You understand and acknowledge that this Agreement discharges the firm from any liability or claim that client or any third-party may have against the firm with respect to any claim, whether filed by client or any third-party that may result from services provided by the firm.

You hereby agree to indemnify, defend and hold the firm harmless from and against any and all claims, demands, losses, suits, judgments, liabilities, costs, damages and expenses, including without limitation, attorneys' fees and court costs at all court levels, arising from or relating to the services provided by the firm. Client further agrees to defend, indemnify and hold the firm harmless from any liability resulting from any claim or cause of action that may be asserted by any third party arising from the services provided by the firm.

You agree that this Agreement is intended to be as broad and inclusive as permitted by the laws of the State of Minnesota, and that this Agreement shall be governed by and interpreted in accordance with the laws of the State of Minnesota, without regard to any conflict of law provisions.

You also agree that the venue for any dispute arising out of this Agreement shall be proper in Hennepin County, Minnesota in the event that any clause or provision of this Agreement is deemed invalid or unenforceable.

The fee for tax preparation services is based upon the specific forms prepared and any additional time or services required. Our forms fee schedule is available upon request.

Tax returns are not filed until we received a signed 8879 and the fee has been paid.

If the foregoing fairly sets forth your understanding, please sign the enclosed copy of this letter in the space indicated and return it to our office. However, if there are other tax returns you expect us to prepare, please inform us by noting so at the end of the return copy of this letter.

We want to express our appreciation for this opportunity to work with you.

If you are in agreement with the above Engagement, please sign below.

Taxpayer signature: ____

Date: ___________________________

WSH Tax Organizer

WSH
TAX ACCOUNTANTS
BUSINESS CONSULTANTS

Thanks for filling out our 2025 Organizer!

The more context and information you provide, the better we can quickly and accurately prepare your return. Our goal is to find the best possible tax outcome for you!

If you have questions about this organizer or are unsure how to answer,
let us know at 952-881-5343 or email frontdesk@wellstax.com.

Your Tax Situation Changes in 2025:

Question	Yes	No	Info to upload/mail/drop off
Did you move in 2025?			Current Address, dates of move(s)
Did your marital status change in 2025?			Describe Type of Change, *(If Relevant:) Name Change*
Did you have more or less dependents than last tax year?			Legal Name, Birthdate, SSN# of New Child, Dependent Parent or Other
Did you have a change in employment?			If yes, describe change and # of jobs held in 2025
Did you purchase, Sell or refinance any real estate? (personal or rental)			Settlement document/ALTA, Document or email information explaining the type of property

New Tax Law in 2025:

Question	Yes	No	Info to upload/mail/drop off
Did you buy a new personal vehicle and finance it in 2025?			**Form 1098-VLI**
Did you work any Overtime or receive Tip income in 2025?			**Final Paystub** for 2025
Did you pay for Vehicle Tabs in 2025?			DMV Receipt(s) or Documentation of amounts

Personal Info Changes in 2025:

Question	Yes	No	If Yes, List New Here:
Did your Phone Number change?			
Did your Email Address change?			
Did your Bank Account Change?			

2025 Household Income:

(For Business, Contractor, or Gig work income, see Business Income section below)

Question	Yes	No	Info to upload/mail/drop off
Did you work as an employee for a business(s)?			Form W-2(s)
Did you receive Interest or Dividend Income?			Form 1099-INT/1099-DIV
Did you receive any retirement distributions this year? (401(k), IRA, SEP, Etc.)			Form 1099-R
Did you rollover your retirement to a new broker or different account?			Form 1099-R
Did you receive or start getting Social Security?			Form SSA-1099
Did you have money in any brokerage investment accounts?			End of Year Summary Tax Documents (Forms 1099-Consolidated)
Did you make any stock, bond or investment sales?			Form 1099-B
Did you sell or exchange Crypto Currency?			Gain/Loss Spreadsheet or 1099-B
Do you have any money in other countries?			Upload/send a Document with list of accounts and highest annual amounts per account.
Did you receive any other types of income? (Disability, Foreign, Gambling, 1099-K etc.)			Upload/send any additional Forms you received. and/or a Document explaining the type and amounts of income.

Common Deductions, Adjustments or Credits:

Question	Yes	No	Info to upload/mail/drop off
Did you donate any money to charity in 2025?			Documentation of organization donated to, the amount donated & a donation acknowledgement or receipt.
Did you donate items to Goodwill or other In-kind charities in 2025?			Documentation of date(s) of donation, value of items donated, receipt from organization. (Use our spreadsheet to calculate the value of your donation)
Do you make mortgage interest payments in 2025?			Form 1098 Mortgage Interest Statement
Did you spend money from a HSA?			Form 1099-SA **(Find form online as it is rarely mailed)**
Did you contribute to a HSA?			Amount *(Form 5498-SA out May 15th)*
Did you contribute to a Traditional or Roth IRA in 2025?			Amount and Type *(Form 5498 out May 15th)*
Did you have Health Insurance through the Marketplace at any time in 2025? (MNSure or Healthcare.gov)			Form 1095-A (Found online)
Did you pay rent on a Minnesota home or apartment?			Minnesota CRP
Did you install any new energy efficient windows, doors, heat pumps, water heaters, A/C, Solar etc. in 2025?			Documentation of items and cost to purchase and install

Education and Dependents:

Question	Yes	No	Info to upload/mail/drop off
Did you pay any child or dependent care?			Document with Tax ID and address of provider, total expenses per person receiving care.
Did you pay K-12 Education Expenses in MN?			Documentation of expenses per Child, and Grade (See link for examples)
Did you spend or get money from an Education Savings Account or a 529?			Form 1099-Q, Form 1098-T & Documentation of Qualified Educational Expenses Paid (see link for examples)
Did you contribute to an 529 plan in 2025?			Amount contributed per account. *If you are a new client:* Financial institution, account number(s)
Did you, your spouse, or a dependent incur tuition expenses that are required to attend a college, university, or vocational school?			Form 1098-T, Documentation of expenses for additional required books, fees and materials.
Did you pay interest on Student Loans in 2025?			Form 1098-E from Loan provider(s)

Estimated Taxes:

Question	Yes	No	Info to upload/mail/drop off
Did you pay State or Federal Estimated Taxes for Tax Year 2025?			Documentation of to whom, amounts and dates paid

Business/Self-employed Income and Expense:

Question	Yes	No	Info to upload/mail/drop off
Did you have business/self-employed income or expenses in 2025?			Filled Sch. C Worksheet (found on our website) and/or a Profit & Loss Report or your bookkeeping spreadsheet.
Did you get paid as a contractor in 2025?			1099 NEC/MISC/K
Did you use a Home Office for your business in 2025?			Fill out section on Sch C Worksheet (found on our website)
Do you own a Partnership or S-Corp? (#1 cause of extension)			Form K-1 (if not prepared by us)
Did you buy your own Health Insurance?			Form 1095-A , B or C

Rental Property Income and Expense:

Question	Yes	No	Info to upload/mail/drop off
Are you a New Client with us?			Depreciation schedule from Previous Year Return (if not done with us)
Did you have one or multiple rental properties in 2025?			Filled Sch. E Worksheet (found on our website) and/or a Profit & Loss Report or your bookkeeping spreadsheet.
Did you purchase new rental properties in 2025?			Settlement document/ALTA, Document or email information explaining the type of property
Did you did you publicly list any new property for rent in 2025?			Upload/send a Document or Email with Date the Property was listed
Did you live in the rental or part of the rental, for all or part of the year?			Upload/send a Document or Email with dates of occupancy and explanation

WSH

(previously Wells, Schluter, Hanson)

Your Privacy

-and our commitment to it-

The personal non-public information we collect about you has been derived from the following sources:

1. Applications, tax preparation worksheets and any other documents that you may have provided for use in preparing your tax return.
2. Transaction with us or others.
3. Information we receive from a consumer reporting agency.

No personal information will ever be disclosed about you to anyone, except that which is already public or permitted by law.

Should you close your account with us, or become an inactive customer, we will continue to adhere to the policy regulations as written here.

The information you give us about your personal or business records is reserved only for our employees who need to know in order to service your account.

Procedural physical and electronic safe-guards will be maintained in compliance with Federal standards regarding non-public personal information.

We are committed to retaining your confidence, and want to assure you that any information you give us remains safe and confidential.

Please feel free to contact us if you have any questions concerning this policy.

7300 France Ave S, Suite 215, Edina MN 55435 | 952-881-5343 | frontdesk@wellstax.com