

**THIS FORM MUST BE RETURNED TO US BY NOV 30, 2023**  
**OR WE CANNOT PREPARE YOUR 2023 RETURN**

**PRICE, STAGNER & CO., PLLC**

Telephone (859) 263-1944  
 Website: <https://www.pricestagner.com>

**Engagement Acceptance Agreement – Tax Year 2023 – Agreed To and Accepted By:**  
**(Engagement letter is available on our website)**

Taxpayer's Name: \_\_\_\_\_

Email Address: \_\_\_\_\_ Phone Number: \_\_\_\_\_

(Please provide updated email/phone number if the above information is not current)

Taxpayer's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

- |   | Yes                      | No                       |
|---|--------------------------|--------------------------|
| 1) Did your marital status / filing status / address / dependents change?.....<br>(If so, please describe changes below)  | <input type="checkbox"/> | <input type="checkbox"/> |
| 2) At any time during 2023, did you (or your spouse) have a financial interest in or signature authority over a financial account located in a foreign country?.....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 3) At any time during 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?..... | <input type="checkbox"/> | <input type="checkbox"/> |
| 4) Would you like your refund directly deposited? If so, provide the following:.....  | <input type="checkbox"/> | <input type="checkbox"/> |

|              |             |             |                                       |
|--------------|-------------|-------------|---------------------------------------|
| Name of Bank | Routing No. | Account No. | Account Type<br>(Checking or Savings) |
|--------------|-------------|-------------|---------------------------------------|

- 5) **NOTE: NEW FOR 2023** – We **MUST** have your driver's license information to file your return. Please provide it below or text a picture of your license(s) to: \_\_\_\_\_

**Taxpayer:**

**Spouse:**

License No: \_\_\_\_\_

License No: \_\_\_\_\_

Issue Date: \_\_\_\_\_

Issue Date: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

State of Issuance: \_\_\_\_\_

State of Issuance: \_\_\_\_\_

- 6) If you have any questions or comments, please share them here:

\_\_\_\_\_

\_\_\_\_\_

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