

Clearview Advisory Group, P.C.

d/b/a Davis CPA Group - NEW Client Packet

Thank you for contacting our office for your tax needs. I have attached the new client paperwork that will need to be filled out and dropped off with your tax return paperwork whenever you are ready. One should be filled out for each tax return being prepared.

If you have tax questions relating to your return, please list them on the paperwork and the tax preparer will contact you prior to starting the tax return. Drop-off is available during our business hours, which are currently M-F 9:00-4:00pm (extended during tax season) or after hours in our drop-box located on the side of the building in our Clarksboro location and front door mail slot at our Laurel Springs location. Our contact information and office locations are listed below.

Davis CPA Group-Clarksboro - 175 W. Cohawkin Road (Mailing address - PO Box 207) Clarksboro, NJ 08020 **MUST USE PO BOX when mailing documents.**

(P) 856-423-0535 (F) 856-599-0086

Davis CPA Group-Laurel Springs - 1400 Chews Landing Rd, Suite 5 Laurel Springs, NJ 08021

(P) 856-627-2100 (F) 856-302-5624

To give an idea of pricing, (and this is only an estimated list as all tax returns will vary) our fee starts at \$350.00 for individual tax returns, which includes the Federal tax return and one state filing, along with electronic filing of the tax returns. This also includes schedules A, B & D (only if the number of transactions are not excessive).

Some additional charges will consist of the following (subject to change): Additional state return(s) - \$85.00 per state

Property Tax Relief - (Senior Freeze) - \$50.00 K1's - \$80.00 each

Schedule C - \$125.00 (which must be itemized otherwise additional fees will be incurred for accounting work)

Schedule E (Supplemental Income - rentals, PTR, Trust/estate, royalties, etc.) - \$125.00 each

Fee for tallying receipts - \$25.00

Copy fee - \$25.00 (hard copy)

Additional processing fee for any MISSED documents after tax return is processed - \$25.00 per document

Additionally, responding to IRS and/or state tax notices will incur additional fees. A 3% fee will be charged for credit card payments.

Thank You,

Clearview Advisory Group, P.C.

d/b/a Davis CPA Group

DEDUCTIONS:

TOTAL

CHARITABLE CONTRIBUTIONS

\$ _____

Please DO NOT include receipts, only TOTALS

NON-CASH CONTRIBUTIONS

\$ _____

MEDICAL EXPENSES*

\$ _____

*Include all out of pocket expenses, prescriptions, dental,

INSURANCE PREMIUMS

\$ _____

vision. **DO NOT** include Employee paid premiums

HSA AMOUNTS

\$ _____

or HSA amounts in the medical expenses.

***PROPERTY TAXES PAID IN 2025:** _____

TOTAL RENT PAID IN 2025 _____

*Provide Property Tax Assessment Card from Township

Number of months in rental: _____

DID YOU PURCHASE A PROPERTY

YES NO

If YES, provide HUD1 Settlement Sheet

DID YOU SELL A PROPERTY?

YES NO

IF YES, What type of property?

PRIMARY HOME

SECONDARY HOME

RENTAL PROPERTY

LAND

THE FOLLOWING INFORMATION IS MANDATORY FOR THE SALE OF A PROPERTY:

Original Purchase Date: _____

Original Purchase Price: _____

Capital Improvements (any work done to the property to improve the value)

TOTAL \$ _____

Date of Sale: _____

Sale Price: _____

***Include a copy of the Settlement Sheet**

BANK INFORMATION FOR DIRECT DEPOSIT

*May provide a copy of a voided check

Bank Name _____

Type of Account _____

Routing Number _____

Is this a Joint Account? YES NO

Account Number _____

SAME ACCOUNT AS LAST YEAR? YES NO

***** Due to new IRS changes, effective September 2025, refunds will no longer be issued via paper check. If you do not provide a bank account, your refund may be delayed or not issued by the IRS.**

ESTIMATED TAXES

Do you need estimated tax payment schedule for 2026?

YES

NO

Must list the following for each Estimated Tax Payments made towards your 2025 tax liability:

	Date Paid	Amount Paid	Method of Payment (Check / EFT)
Federal:	Qtr 1		
	Qtr 2		
	Qtr 3		
	Qtr 4		
NJ/Other:	Qtr 1		
	Qtr 2		
	Qtr 3		
	Qtr 4		

DRIVERS LICENSE OR VALID STATE ID:

Please provide a copy or bring in Taxpayer AND Spouse Valid ID

My/our signature confirms that the information provided is true and accurate to the best of my knowledge. I/we did not have any major changes last year and did not need to complete the detailed client profile packet. I/we understand that failure to provide ALL necessary information will delay the processing of my tax return and I will incur **additional processing fees if any of my documents are missing**. The fee is \$25.00 per document.

Taxpayer's Signature: _____

Date: _____

Spouse's Signature: _____

Date: _____