ADDITIONAL REQUIRED INFORMATION

Referred By:			_
Other Information Required:			
Do you Rent or Own your home (Fo	or states providing Ren	nt Credit ONLY)? Circle One	
Rent Amount per Month \$	How Long Rented?	?	
Landlord's Name and Address:			
			—
			_
			_
School District- <u>IN ONLY</u> :			
IN County Lived on January 1st:	<u>IN</u> Cour	nty Worked on January 1 st :	
Are you a NEW Sate Resident to ANY St	tate? Complete the ne	xt two questions:	
1. Dates moved IN or OUT (circle one)) of State: IN	OUT	
2. State moved TO or FROM:	TO:	FROM:	
Please answer the following for <u>INDIAN</u>	<u>NA</u> :		
☐ Are you a retired Civil Servant ☐ Are you Retired Military or Received	ve Survivor Benefits fro	om the Military? \square Taxpayer \square Spouse	
☐ Are you Reserve National Guard?		, , , , ,	
☐ If yes, was any of your income fr	•	s? ;; or was your unit federalized? □Yes □N	In
☐ How many eligible Children attend	ding home school or Pr	rivate School: Elem-High School Only	-
Did you contribute to a College ChIf yes, Did you provide statemen		ers for each eligible student?	
☐ Did you donate to a Private School	ol or Indiana College?	-	
☐ If yes, Did you provide statemen ☐ Are you and/or your Spouse Publi	•	, and name of institution? n Indiana K-12?	
☐ Do you pay Partnership Long Tern			

Please answer the following for FEDERAL:		
□ Are you still paying on first-time home-buyer cr□ Unemployment received? □Yes □No □ Fore		
☐ Do you have an HSA? ☐ Yes ☐ No	a *	
☐ If yes, Form provided: ☐ 5498-SA ☐ 1099-SA☐ Did you receive a 1095-A from the Marketplace		i.e., Healthcare.gov)
$\ \square$ Do you normally claim any of the following cred	=	, , ,
☐ Earned Income Credit☐ Child Tax Credit		
☐ American Opportunity Credit		
If yes, Did you provide statements with datePlease provide proof the child/dependent liv		f institution?
i lease provide proof the child, dependent in	es with you.	
Cell number you want to receive texts from our porta		
If you do not want to receive texts from our portal	please check here:	_
Payment of Tax Preparation Fees: CASH/CHECK	CREDIT/DEBIT	TAX REFUND
Mother's Maiden Name (ONLY if paying through <u>Tax</u>	Refund):	
· · · · · · · · · · · · · · · · · · ·		
New Clients: How did you hear about us?		
New Clients. How did you hear about us:		
Other Information Necessary to prepare your taxes: _		
, , , , , , , , , , , , , , , , , , , ,		