You: Spouse (if applicable):

**Personal Information**

Photocopy or picture of Driver’s License …………………………….…………………….❑………………..…………..………..❑

Social Security Number…………………………….……………………………………..….…….❑………………..…………..………..❑

Current Address, Phone Number, Email and Profession ­­­­­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Dependent Information**

Full Names, Date of Birth and Social Security Numbers……….…………………….❑………………..…………..………..❑

Childcare records (include provider’s Tax ID or SSN and amount paid)……...❑………………..…………..………..❑

School or Medical Records with Child’s name and your address …………...….❑………………..…………..………..❑

**Income Information**

Did you have any foreign source of Income? ……….……….………………….…(yes)❑………………..…………..…(no)❑

Did you buy, sell or trade any form of cryptocurrency? ………………......…(yes)❑………………..…………..…(no)❑

Did you sell any property?.............................................………………......…(yes)❑………………..…………..…(no)❑

Wage Statement: W-2…………………………..…………………….…….………….…….…….❑………………..…………..………..❑

Interest or Dividend Income: 1099-INT, 1099-DIV or 1099-OID.……………..….❑………………..…………..………..❑

Brokerage Statement: 1099-B, 1099S……………………………….….…………………….❑………………..…………..………..❑

Pension/IRS/Retirement Statement: 1099-R….………………….……………..…….….❑………………..…………..………..❑

Social Security Benefits: 1099-SSA……………..……………………….….…………...…….❑………………..…………..………..❑

Traditional IRA Investment Amounts…………………………………….……………..…….❑………………..…………..………..❑

Unemployment or State Refund: 1099-G……………………………………………..…….❑………………..…………..………..❑

Did you have any other source of income this year that is not above? If so, please explain and provide records­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

You: Spouse (if applicable):

**Deduction Information**

Medical Expenses (Does not Include Insurance Premiums)……………..…..…….❑………………..…………..………..❑

Mortgage Interest: 1098………………………………….…………………………………..…….❑………………..…………..………..❑

Property Taxes…………………………………………..………………………………………..…….❑………………..…………..………..❑

Personal Property Taxes………..…………………..………………………………………..…….❑………………..…………..………..❑

Receipts from Energy Saving Home Improvements……………………………..…….❑………………..…………..………..❑

Cash donated to Charitable Organizations……………………….…..……………..…….❑………………..…………..………..❑

Proof of Non-Cash Charitable Donations……………………………………………..…….❑………………..…………..………..❑

**Education Expenses**

Tuition Statement:10908-T…………………………………………………………..……..…….❑………………..…………..………..❑

Student Loan Interest:1098-E………………………………………………………….…..…….❑………………..…………..………..❑

Records of any Scholarships or Fellowships received………………………………….❑………………..…………..………..❑

**Heath Insurance**

Proof of Coverage: 1095-A, 1095-B, 1095-C….……………………………………..…….❑………………..…………..………..❑

Health Savings Account Statement: 5498-SA……………..…………..…………...…….❑………………..…………..………..❑

Any other tax document that you received but is not specifically listed above should be included in your documents given to JB Financial LLC.

If you have a special case or are uncertain if something needs to be included, please let us know below. You can also ask specific questions that you may have. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If you would like your Return/Payment to be direct deposited/debited from your account, please include your Bank Name, Account Number and Routing Number:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_