

INTERVISIONS, LTD. PIN# _____

CLIENT INFORMATION WORKSHEET

TAX YEAR _____ DOCUMENTS RECV: 1095-A W-2 W2G MISC 1099 1099R MORTGAGE DOC SSA-1099

Only IF New Client 2023 Adjusted gross income \$ _____ DATE _____ SOCIAL
(FIND INFO ON LAST YEAR TAX RETURN 1040 line 11) OF BIRTH _____ SECURITY # _____
TAXPAYER
NAME: _____
SPOUSE: _____
ADDRESS: _____ CITY: _____ STATE: _____ ZIP: _____
OCCUPATION: _____ APARTMENT #: _____
CELL PHONE #: _____ WORK PHONE#: _____ HOME PHONE#: _____
E-MAIL: _____ WEB SITE: _____

CHECK ONE:

- Single/Head of Household
- Married/Filing Joint
- Married/Filing Separate

Babysitters Name _____
 Address: _____
 SS# or FEIN#: _____
 Amt. Paid in 2023: \$ _____
 NEED DOCUMENT FROM BABY SITTER _____

DEPENDENT (S) NAME	SOCIAL SECURITY #	BIRTH DATE	RELATION - SHIP

ANSWER ALL QUESTIONS, THEN SIGN YOUR NAME(S) AND DATE :

- | | | |
|------------|-----------|--|
| YES | NO | |
| _____ | _____ | 1. HAVE YOU FILED A TAX RETURN IN THE LAST 10 YEARS? |
| _____ | _____ | 2. DID YOU RECEIVE A DISTRIBUTION FROM YOUR PENSION PLAN? (INCLUDE DOCUMENT) |
| _____ | _____ | 3. DID YOU COLLECT UNEMPLOYMENT COMPENSATION? (INCLUDE DOCUMENT) REG OR PUA |
| _____ | _____ | 4. DO YOU OWN A HOME? MORTGAGE INTEREST \$ __ PROPERTY TAX (INCLUDE DOCUMENT) |
| _____ | _____ | 5. DID YOU PAY CHILD CARE. IF SO, DID CHILD LIVE WITH YOU FOR SIX MONTHS OF THE YEAR? |
| _____ | _____ | 6. ARE YOU OR YOUR CHILDREN A DEPENDENT ON SOMEONE ELSE'S TAX RETURN? |
| _____ | _____ | 7. DID YOU RECEIVE INTEREST STATEMENT FROM IRS OR BANK \$ _____ |
| _____ | _____ | 8. DO YOU OWE THE IRS OR OWE ANY FEDERALLY FUNDED LOAN OR STUDENT LOAN? |
| _____ | _____ | 9. DO YOU HAVE AN ADOPTED SPECIAL NEEDS CHILD? |
| _____ | _____ | 10. WERE YOU EVER DISALLOWED EIC,CTC,RCTC,ACTC,ODC OR AOTC |
| _____ | _____ | 11. HAVE YOU EVER BEEN MARRIED? |
| _____ | _____ | 12. DID YOU RECEIVE, SELL, SEND CYRPTO CURRENCY? (example. Bitcoin) |
| _____ | _____ | 13. DO YOU OWN RENTAL PROPERTY OR A BUSINESS |
| _____ | _____ | 14. DID YOU MAKE IRA CONTRIBUTIONS FOR 2023? \$ _____ |

(I/We), certify that the information that(I/We) have provided on this document front and back and attachments are for the preparation of (my, our) 2023 INCOME TAX RETURN and to the best of our knowledge are True and correct. (I/We) hold intervsions, ltd. harmless for any mistakes we may have made on or with documentation provided.

Signature _____ Spouse: _____ Date: _____