

INTERVISIONS2, LLC.

PIN# _____

CLIENT INFORMATION WORKSHEET

TAX YEAR _____ DOCUMENTS RECV: 1095-A__ W-2__ W2G__ MISC 1099__ 1099R__ MORTGAGE DOC__ SSA-1099

Only IF New Client 2024 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 2024: \$ _____

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)
- ____ 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 2024? \$ _____

(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) 2024 INCOME TAX RETURN and to the best of (my/our) knowledge are True and correct.

(I/We) hold intervsions2, LLC. harmless for any mistakes we may have made on or with documentation provided.

Signature _____ Spouse: _____ Date: _____