

# RS TAX & ACCOUNTING.

## TAXPAYER INFORMATION FORM 2022

Did you file your taxes with me last year? YES NO

Did you have any virtual currency (i.e.: Bitcoin type) transactions this year? YES NO

Short Form [ ] Long Form [ ] Business [ ] Rental(s) [ ] Stocks [ ]

### General Questions-----

#### Filing Status

Name _____	DOB ____/____/____	SINGLE	[ ]
Driver License # _____	Issue Date ____/____/____	MARRIED/JOINT	[ ]
	Expire Date ____/____/____	MARRIED/SEPARATE	[ ]
Spouse _____	DOB ____/____/____	HEAD OF HOUSEHOLD	[ ]
Driver License # _____	Issue Date ____/____/____	QUALIFYING WIDOWER	[ ]
	Expire Date ____/____/____		

Same as last year? check box [ ] and you can skip address/city/st/zip questions

Current Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Contact Phone \_\_\_\_\_

EMAIL Address \_\_\_\_\_

What "City" if any, should we file for your local tax return? \_\_\_\_\_

### Dependents -----

ALL CLIENTS

First Name  
of Each  
Dependants  
Please

DEPENDENTS	LAST NAME <i>IF DIFFERENT</i>	Birth Date	Age On 12/31 last yr	Mths in home	SS##
_____	_____	____/____/____	____	____	____-____-____
_____	_____	____/____/____	____	____	____-____-____
_____	_____	____/____/____	____	____	____-____-____
_____	_____	____/____/____	____	____	____-____-____

Yes No Did you receive the extra monthly (\$300) "Child Tax Credit" amount last year?

### Tax Form Questions-----

Yes No Did you receive a 1095 A form for your Affordable Care Act insurance?

===Please Include 1095A Form if you received it===

Yes No Were you notified by the IRS that you are required to complete a "Certification" for the Earned Income Credit? (EIC)

Yes No Could any other person claim your children this tax year?

Yes No Day Care? Form Enclosed? Whom to? Address? SS#? Amount?

Yes No Education Credit/Tuition Form Enclosed? What year of school? 1 2 3 4 5+

Yes No Charity Donations Must have Proof Total \$ \_\_\_\_\_

### Long Form Only Questions-----

Yes No Mortgage Interest Form Enclosed?

Yes No Real estate taxes Form Enclosed? (Mortgage statement/tax bills)

Other Notes

Please provide a copy of your 2021 tax return if this is the first year filing your taxes

Provide your bank name, routing number, & account number if you expect a refund and want direct deposit.