



FAMILY AND FINANCE LLC

Income Tax Data Sheet

Year: _____

Filing Status: Married: _____ Single: _____ Married Filing Jointly: _____ Head of Household: _____
Married Filing Separately: _____ Qualifying Widow(er): _____

Name: _____ **DOB:** _____ **SS:** _____

Spouse: _____ **DOB:** _____ **SS:** _____

Phone: _____

Address: _____

If Change of Address, please add OLD address:

Dependents:

1. _____ DOB: _____ SS: _____

2. _____ DOB: _____ SS: _____

3. _____ DOB: _____ SS: _____

4. _____ DOB: _____ SS: _____

5. _____ DOB: _____ SS: _____

6. _____ DOB: _____ SS: _____

Direct Deposit to your Bank: YES

Routing# _____ Bank Account# _____

Child Tax Credit (CTC): YES _____ NO _____

W-2 How many? _____ *leave copies*

1099 How Many? _____ *leave copies*

Copies of:

1095A / apply for health insurance

Social Security: **Mandatory.**

One of the following:

ID, School ID's, Birth Certificate, Vaccine card, Passport, Report card.

If Business: Needs all Records, FEIN, Expenses on Excel, Receipts, 1099's etc

Sign consent: **Mandatory**