

Taxpayer Information

Name: _____ Occupation: _____

SSN: _____ Birthdate: _____ Email: _____

Phone: _____ Cell:

Spouse Information

Name: _____ Occupation: _____

SSN: _____ Birthdate: _____ Email: _____

Phone: _____ Cell:

Address: _____

City: _____ State: _____ Zip Code: _____

Dependent Information

Name(First, Initial, Last Name)	Month, Day & Year of Birth	SSN	Relationship to you	Months lived in your home this tax year?

Questions about your Tax Return

How did you hear about us? _____

Were you referred to us? If so, by whom? _____

Where did you prepare your return last year? _____

How would you like to receive your refund this year?

Check: GreenDot Card Do you have an existing GreenDot card? Yes No

Direct Deposit

Bank Name: _____ Checking Savings

Routing Number: _____ Account Number: _____

Tax Forms

W2 How many? _____ 1099-R How many? _____ 1099-SSA 1098 1099-B 1099 NEC
1099-MISC 1095-A 1099-K K-1 Other Forms _____

Income Sources

Were you self-employed or did you receive income not reported on a tax form? Yes No
Did you receive unemployment last year? Yes No
Did you receive form 1099K from sources such as Venmo, Paypal or Ebay? Yes No
Do you have any other income from any other source? Yes No

General Tax Questions

Can someone claim you as a dependent? Yes No
Did you or your spouse have an IP-PIN? Yes No IP-PIN _____
Were you or anyone in your household disabled or blind? Yes No
Did you or a family member receive a 1095-A or have insurance through the Healthcare Marketplace? Yes No
Were you, your spouse, or any of your dependents a student last year? Yes No
Did you or your spouse live in or receive income from another state? Yes No
Did you pay any estimated/quarterly Federal or State Tax last year? Yes No
Do you currently owe the IRS for back taxes? Yes No
Did you buy, sell, or trade any cryptocurrency? Yes No

Dependent Questions

Can anyone else claim one of your dependents? Yes No
Did any of your dependents incur higher education expenses? Yes No
Did you pay for childcare for any of your dependents? Yes No

Deduction Questions

Did you itemize last year? Yes No
Did you have any unreimbursed Medical Expenses Yes No
Did you pay any home mortgage interest? Yes No
Did you pay any sales tax on any cars, boats, or motor homes last year? Yes No
Did you donate to any charities last year? Yes No
Did you have any gambling losses? Yes No
Did you make any purchases that may qualify for energy credits? Yes No
Did you make any IRA contributions? Yes No
Did anyone in your household make student loan payments? Yes No

Interview Completed by: _____ **Date:** _____

I CERTIFY THAT I WOULD LIKE MY TAXES PREPARED ACCORDING TO THE INFORMATION I SUPPLIED.

Taxpayer's Signature: _____ **Date:** _____

Spouse's Signature: _____ **Date:** _____