# TAX CLIENT INFORMATION SHEET

1. **TAXPAYER/SPOUSE INFORMATION**

Primary Taxpayer Full Name (from social security card): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­­­­­­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Social Security Number: \_\_\_\_\_\_\_\_\_\_-\_\_\_\_\_\_\_\_\_\_-\_\_\_\_\_\_\_\_\_\_\_\_ Date of Birth: MM\_\_\_\_\_\_\_\_\_DD\_\_\_\_\_\_\_\_\_YEAR\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Occupation: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Do you want $3 to go to the Presidential Campaign Fund: \_\_\_\_\_\_\_\_

SPOUSE FULL NAME (as shown on social security card): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Social Security Number: \_\_\_\_\_\_\_\_\_\_-\_\_\_\_\_\_\_\_\_\_-\_\_\_\_\_\_\_\_\_\_\_\_ Date of Birth: MM\_\_\_\_\_\_\_\_\_DD\_\_\_\_\_\_\_\_\_YEAR\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Occupation: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Do you want $3 to go to the Presidential Campaign Fund: \_\_\_\_\_\_\_\_

MARITAL STATUS (circle one): Single Married Separated

STREET ADDRESS: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CITY\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ STATE\_\_\_\_\_\_\_\_\_\_\_\_\_ ZIP\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Daytime Phone #: (\_\_\_\_\_\_\_)\_\_\_\_\_\_\_-\_\_\_\_\_\_\_\_\_\_\_ Drivers License # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Exp date\_\_\_\_\_\_\_\_\_\_\_Issue date\_\_\_\_\_\_\_\_\_\_

Evening Phone #: (\_\_\_\_\_\_\_)\_\_\_\_\_\_\_-\_\_\_\_\_\_\_\_ SP Drivers License # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Exp date\_\_\_\_\_\_\_\_\_\_\_Issue date\_\_\_\_\_\_\_\_\_

1. **EXEMPTIONS**

Please complete the following as applicable

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Name (As shown on social security card) | Date ofBirth | Social SecurityNumber | RelationshipTo Taxpayer | Months inHome |
| Dependent |  |  |  |  |  |
| Dependent |  |  |  |  |  |
| Dependent |  |  |  |  |  |

1. **REFUND**

If you are receiving a refund tell us how you would like to receive the refund. (Check only one)

 \_\_\_\_Check in the Mail (approx. 3 weeks- fees paid up front)

 \_\_\_\_ I’d prefer to make that decision when I know the amount of my refund.

\_\_\_\_Direct Deposit to your account (9-15 days- fees paid up front)

 Financial Institution: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Routing Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Account Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Checking or Savings (please circle only one)

1. **ADDITIONAL INFORMATION**

#### Did you or your spouse at any time during the year: Circle: If yes, please provide

Operate a farm? NO YES

Receive installment payments on property sold? NO YES

Have an interest in a partnership, S-corporation, estate or trust? NO YES All K1 forms

Have income as a minister? NO YES

 Sell stock, mutual fund, or other securities? NO YES All 1099-B forms

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#### Did you or your spouse at any time during the year: Circle: If yes, please provide

 Receive a 1099-NEC or a 1099-MISC? NO YES All 1099NEC or MISC

 Own your own business or were self-employed? NO YES

 Use a portion of your home exclusively for business? NO YES

 Do you own rental property? NO YES

 Receive royalties? NO YES

 Sell your Home NO YES All 1099-S forms

 Sell any other property (equipment, land, etc.)? NO YES

 Did you make estimated tax payments? NO YES

Did you live in any other states? NO YES

Did you work in any other states? NO YES

If yes, list the states and the dates you lived there:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Receive wages, salaries, or any other employer compensation? NO YES All W-2 forms

 Have you received W-2 forms from ALL employers? NO YES

 Receive unemployment compensation? NO YES All 1099-G forms

 Receive Social Security Benefits? NO YES All 1099-SSA forms

 Receive Alimony? NO YES

 If yes, list amount \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Divorce: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Pay alimony? NO YES

 If yes, list name of recipient\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Divorce: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 SSN of recipient\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Amount\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Do you pay daycare expenses? NO YES

Provider name & Address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 If yes, list amount \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SSN\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Receive winnings from gambling? (Lottery, racetrack, casinos, raffles) NO YES All W-2-G forms

 Receive any miscellaneous income? (Prizes, awards, jury duty) NO YES

 If yes, list amount \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 And describe\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Are you claimed as a dependent on someone else’s tax return? NO YES

 Pay interest on student loans? NO YES

 Did you have any transactions involving bitcoin through the year? NO YES

 Receive pension, annuity, IRA or retirement income? NO YES All 1099-R forms

 Receive interest on savings, cash, US bonds, stock dividends? NO YES All 1099-INT

 Do you have any of the following?

 Home Mortgage? NO YES All 1098 forms

 Medical expenses or pay for health insurance? NO YES List with amounts

 Contributions to charity, church, etc? NO YES List with amounts

 Out-of-pocket expenses or use your personal vehicle on the job? NO YES List with amounts

 Loss from casualty (fire, theft, natural disaster) NO YES List with amounts

 Did you have a job related move? NO YES

 Contribute to an IRA, SEP, Keogh, or simple retirement plan? NO YES

 Pay college tuition expenses? NO YES

#####  SIGNATURE

#### ALL INFORMATION I HAVE GIVEN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE

**SIGNATURE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**