KNT
INCOME TAX & NOTARY

# Form

## KNT Income Tax & Notary - Master Client Intake & Engagement Form - Tax Year 2025

**Do you owe IRS/State taxes, student loans, Social Security, Section 8, child support, or other debts?**

☐ Yes
☐ No
☐ I have called and confirmed my status

**Step 1:**
**An Offset Check is (Required Before Filing). Do you owe IRS/State taxes, student loans, Social Security, Section 8, child support, or other debts? Please call the offset line at 800-304-3107 and click option 1 for federal offset first and then hang up and call back and click option 2 for state offset. The number is to see if you owe any money, because if you do, your federal and/or state refund will be offset for what you owe or taken fully to satisfy said debt.**

**Refund Advance Loan OptionWould you like to apply for a refund advance loan up to $7,500 (subject to bank approval)?**

☐ Yes
☐ No

**Full Name**

First Name Last Name

**DOB:**

Year

**SSN:**

**Email**

example@example.com

**Phone Number**

Please enter a valid phone number.

**Best Contact Method**

- ○ Phone
- ○ Email

**Address**

Street Address

Street Address Line 2

City

State / Province

Postal / Zip Code

**Filing Status**

- ○ Single
- ○ Head of Household
- ○ Married Filing Joint
- ○ Married Filing Separate
- ○ Qualifying Widow(er)

**If Married or Married Filing Separate (Spouse) Name**

First Name

Last Name

**Spouse DOB:**

Month Day Year

**Spouse SSN:**

**Dependent 1**

First Name Last Name

**DOB**

Month Day Year

**SSN:**

**Dependent 2**

First Name Last Name

**DOB**

Month Day Year

**SSN**

**Dependent 3**

First Name Last Name

**DOB:**

Day Year

**SSN:**

**Dependent 4**

First Name Last Name

**DOB:**

Month Day Year

**SSN:**

**Step 2. Income Sources: Employment, Unemployment, Social Security, Retirement, Self Employment, etc.**

**Forms Of Income:**

- ◯ W-2
- ◯ Unemployment
- ◯ 1099-GIG
- ◯ Retirement/Pension
- ◯ Social Security
- ◯ Interest

**Itemized Deduction Documentation**

If you plan to itemize, please provide receipts or statements for any applicable expenses, including:
Medical and dental expenses
Charitable donations
Mortgage interest (Form 1098)
Property taxes
State and local taxes paid
Unreimbursed job-related expenses
Education expenses
Casualty or theft losses (if applicable)
Clients are responsible for providing complete and accurate documentation for all income and deductions claimed. KNT Income Tax & Notary cannot claim itemized deductions without proper receipts or supporting documentation.

**Step 3. INSURANCE & SECURITY**

**ACA Marketplace Insurance / Connect For Health Colorado**

- ◯ YES
- ◯ NO
- ◯ UNSURE

**IRS IP PIN**

- ◯ YES
- ◯ NO
- ◯ UNSURE

**Ever been denied credits before?**

- ◯ YES
- ◯ NO
- ◯ UNSURE

**PAYMENT OPTIONS**

- ◯ PAPER CHECK
- ◯ DIRECT DEPOSIT
- ◯ DEBIT CARD

**ROUTING #**

**ACCOUNT #**

By signing below, you agree to the following terms: **KNT Income Tax & Notary** will prepare your tax return based on the information you provide. You affirm all information/documents are true and correct. You understand **KNT Income Tax & Notary** is not responsible for any omitted or incorrect information you provide or fail to provide. Fees are due at the time of service and can be deducted from your refund. You authorize **KNT Income Tax & Notary** to e-file your return once approved. Refund advance loans up to $7,500 are subject to bank approval.

Continue