

MOSS GLOBAL L.L.C.
Tax Services Packet

WELCOME TO MOSS GLOBAL L.L.C. TAX SERVICES

At **MOSS GLOBAL L.L.C.**, we specialize in helping individuals, families, and businesses navigate the complex world of taxes with ease. Our team of experts is dedicated to providing top-tier tax preparation services, ensuring that you maximize your refund, minimize your tax liability, and stay compliant with the latest tax laws. Whether you need personal tax filing, business tax assistance, or strategic financial planning, we are here to help!

OUR SERVICES INCLUDE:

- ✓ Individual & Family Tax Preparation
- ✓ Business Tax Preparation
- ✓ Self-Employment & 1099 Tax Filing
- ✓ Tax Credit & Deduction Maximization
- ✓ IRS Correspondence Assistance
- ✓ VA Disability Benefit Tax Planning
- ✓ Real Estate & Investment Tax Strategies
- ✓ Business Financial Consultation

We take pride in offering **personalized, reliable, and efficient service** to ensure you get the best outcome possible. Our goal is to make tax season **stress-free** for you!

TAX REFUND INTAKE FORM

CLIENT INFORMATION

Full Name: _____
Date of Birth: // _____
Social Security Number: -- _____
Address: _____
City: _____ State: _____ Zip Code: _____
Phone Number: (_____) - Email: _____

FILING STATUS (Check one)

- ☐ Single
- ☐ Married Filing Jointly



- ☐ Married Filing Separately
☐ Head of Household
☐ Qualifying Widow(er)

DEPENDENT INFORMATION (If applicable)

Full Name	Date of Birth	Social Security Number	Relationship	Months Lived with You	Claimed Previously? (Yes/No)

INCOME INFORMATION

(Provide copies of all relevant income documents)

- ☐ W-2 (Wage & Tax Statement)
☐ 1099-NEC (Self-Employment Income)
☐ 1099-MISC (Miscellaneous Income)
☐ 1099-G (Unemployment Benefits)
☐ 1099-R (Retirement Distributions)
☐ SSA-1099 (Social Security Benefits)
☐ 1099-DIV/1099-INT (Dividends/Interest Income)
☐ Other: _____

DEDUCTIONS & CREDITS

(Provide supporting documents where applicable)

- ☐ Student Loan Interest
☐ Childcare Expenses (Provider Name & EIN/SSN Required)
☐ Mortgage Interest (Form 1098)
☐ Medical Expenses (if itemizing)
☐ Property Taxes Paid
☐ Charitable Contributions
☐ Education Credits (Tuition, Books - Form 1098-T)
☐ IRA Contributions



- ☐ Business Expenses (if self-employed)
☐ Other: _____

DIRECT DEPOSIT INFORMATION

(For refund payments)

Bank Name: _____
Routing Number: _____
Account Number: _____
☐ Checking ☐ Savings

ADDITIONAL INFORMATION

Are you self-employed? ☐ Yes ☐ No
Did you receive any stimulus payments in the last tax year? ☐ Yes ☐ No
Did you receive any advance Child Tax Credit payments? ☐ Yes ☐ No
Do you owe back taxes, child support, or federal debts? ☐ Yes ☐ No
Any other financial or tax concerns we should know about?

ACKNOWLEDGMENT & SIGNATURE

I certify that the information provided is accurate and complete to the best of my knowledge. I authorize **MOSS GLOBAL L.L.C.** to prepare my tax return based on the information provided.

Client Signature: _____
Date: // _____

TAX QUESTIONNAIRE

(To ensure we provide the best service, please answer the following questions)

1. Have you moved in the last year? ☐ Yes ☐ No
If yes, new address: _____
2. Have you received any letters from the IRS in the past year? ☐ Yes ☐ No
3. Did you make any charitable donations this year? ☐ Yes ☐ No
If yes, amount donated: \$ _____
4. Did you have any major life changes (marriage, divorce, new child, etc.)? ☐ Yes ☐ No
5. Did you have any gambling winnings or losses? ☐ Yes ☐ No
6. Did you receive rental income from properties you own? ☐ Yes ☐ No
7. Did you contribute to a retirement account (401k, IRA, etc.)? ☐ Yes ☐ No
8. Did you start or run a business in the past year? ☐ Yes ☐ No



9. Do you have any foreign bank accounts or investments? ☐ Yes ☐ No
10. Any additional income or deductions not listed?
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FOR OFFICE USE ONLY

Prepared By: _____

Date: // _____

Reviewed By: _____

Date: // _____

