# ALWAYS AVAILABLE TAX SERVICE

2024 CLIENT INFORMATION FORM

(Please complete all information below that Apply)

TODAY’S DATE:

AMENDED YEAR (*if applicable*):

NEW CLIENT: RETURNING CLIENTS:

* Check only one of the following:

 Single Married Filing Jointly Head of the House Qualifying Widow

 Married Filing Separate

Mr./Mrs./Ms./Miss (please circle one)

PRIMARY NAME:

SSN: DOB:

United States Citizen \_\_\_\_ Resident Alien \_\_\_\_ Non-Resident Alien \_\_\_

SPOUSE NAME:

SSN: DOB:

United States Citizen \_\_\_\_ Resident Alien \_\_\_\_ Non-Resident Alien \_\_\_

ADDRESS:

CITY: STATE: ZIP CODE:

Your HOME #:

WK #: CELL #:

SPOUSE HOME #:

SPOUSE WK #: SPOUSE Cell #:

YOUR OCCUPATION: SPOUSE OCCUPATION:

REFFERRED BY: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

EMAIL:

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

## \*Dependents: (It is especially important that this information be accurate to avoid delaying your refund) \*

DEPENDENTS NAME

D.O.B. United States Citizen \_\_\_\_ Resident Alien \_\_\_\_ Non-Resident Alien \_\_\_

SSC #

RELATIONSHIP # of months lived in your home

DEPENDENTS NAME

D.O.B. United States Citizen \_\_\_\_ Resident Alien \_\_\_\_ Non-Resident Alien \_\_\_

SSC #

RELATIONSHIP # of months lived in your home

DEPENDENTS NAME

D.O.B. United States Citizen \_\_\_\_ Resident Alien \_\_\_\_ Non-Resident Alien \_\_\_

SSC #

RELATIONSHIP # of months lived in your home

DEPENDENTS NAME

* + 1. United States Citizen \_\_\_\_ Resident Alien \_\_\_\_ Non-Resident Alien \_\_\_

SSC #

RELATIONSHIP # of months lived in your home

**Please indicate your method of payment to Always Available Tax Service below:**

 **\*\**If you are not choosing a Bank product*\*\***

CASH: VISA/DEBIT CARD: CHECK: FEE’S WITHHELD:

**PROTECTION PLUS AUDIT ASSISTANCE& LEGAL SERVICE**

 **For Every Tax Client**

(Ask about Protection Plus Plan & Identity Theft Restoration) Tax Preparation Guarantee *-Reimbursement for added expenses incurred due to legitimate preparer errors up to $2,500.*

## Please indicate how you wish to receive your refund below:

CHECK: GreenDot CARD: BANK ACCOUNT: \_\_\_\_

## Direct Deposit Information:

NAME OF BANK

Checking or Savings Routing #

Account #

## *Will you be applying for FAST CASH ADVANCE LOAN: (Approved up to $7000) please ask how?*

*Accepted Decline\_\_\_\_\_\_\_\_*

## PREPARATION CHECK LIST FOR TAX RETURN

LIST OF DOCUMENTS - CHECK LIST COLUMN

Social Security Card(s) Driver’s License(s) Dependents’ Social Security Numbers & Dates of Birth Last Year's Federal and State Tax Returns

Wage Statements - Form W-2

1095-A Form Health Care Marketplace \_\_­­\_\_

Pension or Retirement Income - Form 1099-R

Interest and Dividend Income - Form 1099-INT/Form 1099-DIV State Income Tax Refund Amount - Form 1099-G

Social Security Income - Form SSA-1099 Unemployment Income - Form 1099-G Commissions Received/Paid

Information on sales of Stocks or Bonds - Form 1099-B

Self-Employed Business/Farm Income & Expenses - Form 1099-MISC Merchant Card and Third-Party Network Payments 1099-K

Lottery or Gambling Winnings - Form W-2G Lottery or Gambling

Income and Expenses from Rentals

Income from Partnerships, S Corporations, Trusts, and Estates - Schedule K-1 IRA Contributions

Alimony Paid or Received

Childcare Expenses & Provider Information Medical, Eye Care, and Dental Expenses

Cash and Non-cash Charitable Donations Record of Purchase or Sale of Residence

Mortgage or Home Equity Loan Interest Paid - Form 1098 Real Estate and Personal Property Taxes Paid

State or Local Sales Taxes Paid

Un-reimbursed Employment-Related Expenses Job-Related Educational Expenses

Educator Expenses

Tuition and Education Fees - Form 1098-T Student Loan Interest - Form 1098-E Casualty or Theft Losses

Estimated Taxes Foreign Taxes Paid

 Foreign Accounts \_\_\_\_

 OTHER\_\_\_\_ \*\*\* Please list on back of this form \*\*\*

# ALWAYS AVAILABLE TAX SERVICE

**Always Available Tax Service IRS OFFSET OF WITHHELD FEES DISCLOSURE NOTICE**

* + - 1. Outstanding IRS Debt
			2. Back Child Support
			3. Outstanding Student Loan Debit

***In the event that you have an Offset or Lien****,* ***the IRS will withhold the debit owed from the tax refund and release any remaining funds to the bank***. Upon receipt of the funds from the IRS, the bank will withhold the Tax Preparation Fees & Bank Fees and then release any remaining funds. THIS PROCESS WILL LIKEY TAKE A FEW DAYS.

In the event there is not enough funds remaining in the refund to cover tax preparation fees, the balance of the ***Tax Preparation Fees will be due immediately to ALWAYS AVAILABLE TAX SERVICE***.

## I understand the above disclosure regarding the IRS OFFSET of withheld tax preparation fees, and with pay accordingly.

**Taxpayer's Signature**

**Date**

**Spouse's Signature**

**Date**