

A TEJEDA ACCOUNTING SERVICES CLIENT INTAKE SHEET FOR TAX YEAR _____

FILING STATUS:

☐ SINGLE
 ☐ HEAD OF HOUSEHOLD
 ☐ MARRIED FILING SEPARATE
 ☐ MARRIED
 (NOT MARRIED W/DEPENDENTS)

Did you have health insurance for the entire year? YES ☐ NO ☐
 Did you obtain your health insurance through the: Market Place ☐ Employer ☐ Self paid insured ☐
 Do you have your 1095 A ☐ B ☐ C ☐

TAXPAYER FULL NAME AS IT APPEARS ON YOUR SS CARD:	SPOUSE NAME AS IT APPEARS ON SS CARD:
ADDRESS: _____ CITY _____ STATE _____ ZIP _____	ADDRESS: _____ CITY _____ STATE _____ ZIP _____
TELEPHONE NUMBERS: HOME _____ CELLULAR _____ WORK _____	TELEPHONE NUMBERS: HOME _____ CELLULAR _____ WORK _____
SOCIAL SERCURITY NUMBER:	SOCIAL SERCURITY NUMBER:
DATE OF BIRTH:	DATE OF BIRTH:
OCCUPATION:	OCCUPATION:
EMAIL ADDRESS:	EMAIL ADDRESS:
NOTES:	NOTES:

DEPENDENTS

DEPENDENT NAME	SSN#	DOB	RELATIONSHIP

☐ Check box if you would like your fees deducted from your refund. By doing this, you are allowing A Tejeda Accounting Services, to check the Financial Management System (FMS) on your behalf for any outstanding debt that may be deducted from the refund due to you.

☐ I choose not to have my fees deducted from my return. I choose to pay my fees at the time of service, for completion of my tax return. I understand that A TEJEDA ACCOUNTING SERVICES REQUIRES ALL FEES PAID AT THE TIME OF SERVICE.

CLIENT SIGNATURE: _____

REFERRED BY: _____

A Tax Office INC.
INFORMATION FOR YOUR TAX PREPARER

Please Answer Each Question That Applies To You, Additional Space Provided If Needed

Please answer Y (ye Yes) N (No)

INCOME INFO	DEDUCTIONS	PAY OUT OF POCKET
How many W2's do you have ?	Do you have Mortgage interest ?	Did you owe the state last year ?
Did you receive Unemployment ?	Did you pay Real Estate tax ?	Did you pay the State?
Did you receive any bank interest ?	Did you pay vehicle tax ?	Did you pay Alimony ?
Did you receive any Misc.1099 income ?	Did you pay Tithes ?	Did you file taxes last year?
Do you have rental property ?		Did you receive a Federal Refund last year?
Do you receive social security ?		Do you owe the IRS ? If so, How much do you owe?
Did you take money from your 401k ?		Have you received any letters from the IRS?
Do you have self employment income ?		Did you pay or borrow funds for college tuition?
Did you sale any stock ?		How much paid for self?
<u>NOTES</u>		How much paid for child?

Are you a victim of Identity Theft? ____Yes ____No

CHILD CARE EXPENSES
Do you have Child Care expenses?
Name of Child care Provider?
Address:
Federal ID Number:
Amount:
Misc info.
Are you a Armed Forces Reservist?
Are you part of a business Partnership or Corporation?

Signature: _____