



Tax Filing Basic Info

DATE: _____

DEPOSIT AMOUNT: _____

Tax year: _____ Tax Pro: _____

Please fill out this form and gather all your needed documents before you come to our tax office to save our time. This is a guideline which does not include all documents. We do not share your information with anyone without your approval.

Please have the following documents with you: Driver license or photo ID of you & spouse, SSN or ITIN for everyone on the tax return, dependent's proof of residency (school/doctor records...) and last year's tax return if you have it.

Taxpayer Name:	Spouse Name:		
Occupation:	Occupation:		
Birth Date:	Birth Date:		
Address:	Apt#:	City:	State: Zip:

Contact Phone:	Email:
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Filing status: Single Married Filing Jointly Married Filing Separately Head of Household Qualifying Widower

Proof of dependents living with you: School records _____ Medical records _____ Child Care records _____ Other _____	Date of Birth mm/dd/yyyy	Relationship	Months lived in your home this tax year
Dependent Name (First, Middle Initial and Last Name)			

Please Answer All That Apply

Did you pay estimated Federal or State taxes last year? For MFS, did your spouse itemize? Yes _____ No _____

Did you receive any virtual currency?

Chk Sv Routing # _____ Account # _____ for direct deposit / direct debit

Documents Received	You	Spouse	Dependents
All Income W-2, K-1s and any Income Statement (jury duty, hobby, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Form 1099s: Unemployment Compensation (1099-G), Interest Income (1099-INT), Dividend Income (1099-DIV), Cancellation of Debt (1099-C), ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sold Stocks (1099-B) - Sold Virtual currency (1099-DA)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Form 1098-T - Tuition Statement, Tuition & Book Receipts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Form 1098-E - Student Loan Interest Statement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Retirements (1099-R) - Social Security Benefit Statement (SSA-1099)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Form W-2G - Certain Gambling Winnings - Loss receipts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Final paystub by Dec. 31 for overtime, tips, or HSA amounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Property/House purchased/sold Closing Statements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expenses Records	You	Spouse	Dependents
529 for (K-12) School - Childcare / After-school care Annual Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HSA-Health Savings Account: Distribution 1099-SA, Contribution 5498-SA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mortgage Interest 1098, Property Tax, Medical expenses if more than 10% AGI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Charitable Retirement (1099-R). Charitable donations or expenses records.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IRAs contributions (Form 5498) records	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Casualty Losses / Theft Losses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Annual Car Loan Interest Report/ Dec. Statement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Electric Vehicle / Energy-saving improvements to your home Receipts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health Insurance Marketplace - ACA	You	Spouse	Dependents
If enrolled in ACA, must provide Form 1095-A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
For Self-Employed or Small business / Rental Property	You	Spouse	Dependents
Income: 1099-K, 1099-NEC, 1099-MISC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Annual Business Income and Expenses - Profit-Loss - Balance Sheet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Home Office Expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rental Property Income and Expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Income and Expenses from outside the U.S.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>