



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:	
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

<input type="checkbox"/> Did you pay estimated Federal or State taxes last year?	For MFS, did your spouse itemize?	Yes____ No____
<input type="checkbox"/> Did you receive any virtual currency?		
<input type="checkbox"/> Chk <input type="checkbox"/> 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"/>	
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"/>	
Form W-2G - Certain Gambling Winnings - Loss receipts	<input type="checkbox"/>	<input type="checkbox"/>	
Final paystub by Dec. 31 for overtime, tips, or HSA amounts	<input type="checkbox"/>	<input type="checkbox"/>	
Property/House purchased/sold Closing Statements	<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"/>	
Casualty Losses / Theft Losses	<input type="checkbox"/>	<input type="checkbox"/>	
Annual Car Loan Interest Report/ Dec. Statement	<input type="checkbox"/>	<input type="checkbox"/>	
Electric Vehicle / Energy-saving improvements to your home Receipts	<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"/>	
Annual Business Income and Expenses - Profit-Loss - Balance Sheet	<input type="checkbox"/>	<input type="checkbox"/>	
Business Home Office Expenses	<input type="checkbox"/>	<input type="checkbox"/>	
Rental Property Income and Expenses	<input type="checkbox"/>	<input type="checkbox"/>	
Income and Expenses from outside the U.S.	<input type="checkbox"/>	<input type="checkbox"/>	