

2021 New Client Intake

TP Last Name _____ First Name _____ MI _____

SSN _____ DOB _____ Occupation _____

SP Last Name _____ First Name _____ MI _____

SSN _____ DOB _____ Occupation _____

Home Address: _____

Phone Numbers: Home: _____

TP Cell: _____ SP Cell: _____

TP Email: _____

SP Email: _____

Dependents:

Full Name _____ SSN _____

DOB _____ School _____

Full Name _____ SSN _____

DOB _____ School _____

Full Name _____ SSN _____

DOB _____ School _____

Full Name _____ SSN _____

DOB _____ School _____

Income (check those being submitted and indicate how many of each will be submitted)

- _____ Copy of the last 2 years tax returns
- _____ Original form(s): W-2
- _____ Schedule(s) K-1: Income from Partnership, S-Corp, Estate or Trust
- _____ Original form(s): 1099-R (retirement) and/or 1099-Misc (Self-employment)
- _____ Original form(s): 1099-INT (interest) and/or 1099-DIV (dividend)
- _____ Brokerage statement(s): Sales of Stocks, Bonds, etc (include date of purchase and purchase price)
- _____ Original form(s): SSA (Social Security) and RRB (Railroad Benefits)
- _____ Original form(s): W-2G (gambling winning)
If there are gambling winnings, include gambling losses: _____
- _____ Alimony Received
- _____ Unemployment Benefits
- _____ Any other income not reported on an original form

Adjustments (check those that apply)

- _____ Teacher expenses
- _____ Self-Employed Health Insurance
- _____ Alimony Paid: Amount paid _____
Name & SSN of recipient: _____
Date Divorce was finalized _____
- _____ Contributions to an IRA (Traditional or Roth)
- _____ Contributions to a Health Savings Account

Education:

American Opportunity (# years taken) _____ or Lifetime Credit _____

Did the Student complete the first FOUR years of college Yes _____ No _____

_____ Original form(s): 1098-T Education & Tuition Fees

_____ Cost of Books and Supplies

_____ Student Loan Interest Paid

_____ Amount contributed to BrightStart or Bright Directions 529 plan

Credits:

Child Care Expenses:

_____ Provider Name, Address, Amount Paid, and SSN or EIN

Deductions:**Medical & Dental:**

_____ Health Insurance Premiums: post -tax paid

_____ Number of Medial Miles Driven

_____ Long-term care premiums

_____ Total amounts paid for Co-pays to doctor, dentist, prescriptions, labs, x-rays, glasses.

Taxes paid:

_____ Real Estate on primary residence

_____ Property Tax PIN

_____ Real Estate on secondary residence and/or land

_____ Property Tax PIN

_____ Personal Property taxes: Cars, boats, RV, etc.

Interest Paid:

_____ Original form(s): 1098 Mortgage Interest Paid

_____ Closing statement on purchase or sale of home

Cash Contributions:

_____ List amount paid by Check, Cash, or Credit Card (Must be to Non-Profit Organization)

_____ Non-Cash Donation: Receipt from Non-Profit Organization, List donated goods and thrift store value

Estimated Tax Payments:

Quarter	Federal	State	Date Paid
1st			
2nd			
3rd			
4th			

Direct Deposit:

If you'd like any refunds due direct deposited into your account, please provide the following information:

Bank Name: _____

Routing #: _____ Account #: _____

Account Type (*check one*) Checking: _____ Savings: _____ Other: _____

Health Insurance Coverage:

_____ Original form(s): 1095-A, 1095-B and/or 1095-C

_____ Month(s) each family covered with Health Insurance

Indicate months covered (Y or N)

January	February	March	April
May	June	July	August
September	October	November	December

Stimulus Payments:

Please provide the exact amounts of the 3rd EIP payment received March 2020.

_____ *This was the payment of up to \$1400 per person.*

Please note that stimulus payments are not taxable income to you. They were an advance of a 2021 tax credit and need to be reconciled on your tax return.

Advanced Child Tax Credit:

Total amount of Advanced Child Tax Credit received: _____

In July 2021, monthly payments of the Advanced Child Tax Credit began for qualifying taxpayers with dependents. The total amount of these payments needs to be included on your return. This is not taxable income to you; however, it does reduce the amount of Child Tax Credit received on the tax return. This can reduce refunds and, in some cases, will result in a balance due.

