

Please Check:___ Check Printed:___ Direct Deposit:___ Take Fee Out:___

Old Client:___ New Client Referred By:_____

RD CORPORATE TAX & ACCOUNTING, INC

2880 West Oakland Park Blvd

Suite 211

Oakland Park, FL 33311

OFFICE: _754-313-0480* Fax No.:

E-mail: reneattestaxservice@gmail.com

2025 INCOME TAX INTAKE SHEET

Client Name: _____

Current Address: _____ City _____

State _____ Zip Code _____

Telephone No.: _____ Cell No.: _____

E-Mail Address: _____

Marital Status: ☐ Married ☐ Single ☐ Widow ☐ Head of Household ☐ Married Filing Separate

Social Security No.: _____ Date of Birth: ____/____/____ Occupation: _____

MARRIED ONLY: Spouse Name: _____

Spouse Social Security No.: _____ Date of Birth: ____/____/____

Occupation: _____ Title _____

INCOME INFORMATION

W-2's# ____ 1099's # ____ 1099DIV # ____ 1099 MISC ____ Bank Interest Forms (**1099INT**) # ____ 1098T# ____

Please attach copies of all Tax forms listed above (LAST PAYCHECK IS NOT welcomed)

HEALTHCARE INSURANCE INFORMATION

☐ 1095-A ☐ 1095-B ☐ 1095-C

DEPENDANTS INFORMATION (CHILDREN)

Dependants: ☐ YES (*if yes how many ____?*) ☐ NO

Names	Social Security No.	Date of Birth
_____	_____	___/___/___
_____	_____	___/___/___
_____	_____	___/___/___

Children dependents must have lived with you 51% of the current Tax Year.

Childcare Expense: YES ☐ NO ☐

Name of Facility: _____

Address: _____ City _____ State _____

Childcare Tax ID No.: _____ (OR) Social Security No.: _____

DEPENDANT INFORMATION (ADULT)

Dependant does not have to live in household but you must be supporting the dependant:

☐ Medical Expense ☐ Food/Clothing ☐ Household Expense (rent, mortgage, etc) ☐ Transportation Expense

Name	Social Security No.	Date of Birth
_____	_____	___/___/___

EDUCATION INFORMATION

Did you or your family member attend college or trade school in 2022? YES ☐ NO ☐

Name of Facility (School): _____

Address: _____ City _____ State _____

Tax ID # _____ Did you earn a Degree? YES ☐ NO ☐

(If tuition was paid, you need form from school 1098T) Attached YES ☐ NO ☐

Out of Pocket Expenses (Tuition, Books, Supplies, Dorm Costs... etc) \$ _____

HOME EXPENSE INFORMATION

Own ☐ or Rent ☐ (If own, please attach or list the following information)

Mortgage Interest Amount Paid: \$ _____

Property Taxes Paid in 2024: \$ _____

MEDICAL EXPENSE (7.50% OF GROSS INCOME)

Physician Expense: \$ _____ Hospital Expense: \$ _____

Pharmacy Expenses: \$ _____ Premiums NOT Reimbursed \$ _____

Dental Expense: \$ _____ Travel Medical Expense: \$ _____

CHARITABLE EXPENSES

Cash Donations: \$ _____

Travel Expenses \$ _____

Donating of Goods: \$ _____

Mileage _____

☐ Clothing ☐ Furniture ☐ Vehicle(s) ☐ Household Goods

Name of Facility Example: (**Goodwill, Red Cross, Salvation Army, Church –Tithes, etc.**)

Address: _____ City _____ State _____

Tax ID No.: _____ Social Security No.: _____

TITHES & OFFERING

Name of Facility (Church or other Organizations):

Address: _____ City _____ State _____

Tax ID No.: _____ Social Security No.: _____

DIRECT DEPOSIT

PLEASE PROVIDE A VOIDED CHECK IF YOU WOULD LIKE DIRECT DEPOSIT

Bank Name: _____

Routing No.: _____ Account No.: _____

*****REMEMBER: The More Information You Provide, THE MORE MONEY IN YOUR POCKET!!!*****

I, _____ authorize RD CORPORATE TAX & ACCOUNTING, INC, to prepare my tax return. All information provided on this intake is true and correct at the best of my knowledge. RD CORPORATE TAX & ACCOUNTING, INC and all employees will not be held responsible for any overpayment of tax return.

Signature: _____ Dated: _____

COST FOR SERVICES 2025

Individual Tax Return Preparations with or without Dependents and Itemizing/ Sch C-----\$250.00 & Up

Married filing Jointly Preparations with or without Dependents /Sch C----- \$500.00 & Up

Business Tax Return Preparations Corporation-----\$400.00 & Up

TOTAL + E-FILE - \$ _____

THE THIRD-PARTY BANK IS META BANK. THIS BANK IS NOT AFILIATED WITH MY ACCOUNT!!!!

*****ALL PAYMENTS MUST BE PAID AT THE TIME OF THE SERVICES....NO EXCEPTIONS!!!**

If you are doing Direct Deposit, payment is due upfront, or the fee will be taking out of your tax refund. If you do not have a checking account or savings, a check can be printed. The bank is not my personal account. It comes from Meta Bank. ALL fees will be immediately withdrawn from your tax refund. NO EXCEPTIONS!!

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