



KURRENCY TAX SOLUTIONS LLC

Elite Tax Preparation Services

Tax services will NOT start until January 26, 2025

Pricing:

- W-2 (Employee): \$350
- 1099 / Self-Employed: \$550
- Business Returns: \$750+

Refer to: www.kurrencytaxsolutions.com



Kurrency Tax Solutions – Client Intake Form

Client Information

Full Legal Name

Social Security Number / ITIN

Date of Birth

Phone Number

Email Address

Current Address

Preferred Method of Contact

Phone

Email

Text

Filing Information

Tax Year

Current Year

Prior Year(s)

Filing Status

Single

Married Filing Jointly

Married Filing Separately

Head of Household

Filed Taxes Last Year?

Yes

No

Not Sure

Income Information (Check All That Apply)

- W-2 Employee**
- 1099 / Self-Employed**
- Business Owner**
- Multiple Income Sources**
- Rental Income**
- Gig / Cash Income**

Business Information (If Applicable)

Business Name

Business Type (LLC / Sole Prop / Other)

EIN (if applicable)

Service Requested

W-2 Individual Tax Filing
1099 / Self-Employed Filing
Business Tax Return
Prior-Year Tax Filing

W-2 Employee Filing Section

I am filing with W-2 income only.

I have multiple W-2 forms.

Required W-2 Documents

All W-2 forms from each employer

Government-issued photo ID

Social Security card or ITIN

Prior-year tax return (if available)

I understand my return cannot be prepared without all W-2 documents.

Client Acknowledgments

- I understand pricing is based on return complexity.**
- I understand no filing occurs without my approval.**
- I understand refunds are not guaranteed.**
- I understand intake is required before document upload.**

Electronic Signature

Date