

"2023" NEW CLIENT

Taxpayer Name: _____

DOB: _____ SSN: _____

Spouse's Name: _____

DOB: _____ SSN: _____

Are you legally married? YES NO **If Married Filing Separately or Head of Household, filers must also complete the back of this form.**

Total dependents you are claiming: (List ALL Dependents)

Name: _____ DOB: _____ SSN: _____ Relationship: _____

Are you claimed as a dependent on another tax return? YES NO

What is your current telephone number(s)? _____

What is your email address? _____

What is your mailing address? _____

What is your filing status for 2023?

Single Married Head of Household Married Filing Separately

(If Married Filing Separately or Head of Household, filers must also complete the back.)

Foreign Accounts, Virtual Currency

Do you have any foreign accounts, investments or virtual currency transactions? YES NO

If yes, please explain: _____

Health Insurance

Do you have health insurance through the Affordable Care Act? (Obama Care) YES NO

If yes, please provide form 1095-A

Do you have a copy of prior years tax return?

YES NO

If yes, please provide.

If you receive a refund, would you like it to

be direct deposited? YES NO

If yes, please provide a copy of a voided check.

We will need to make copies of a valid driver's license for both taxpayer & spouse, social security cards taxpayer/spouse/dependent(s) and birth certificates for all dependents.

* Would you like your copy of your tax return digital, paper, or both? Provide email address above for digital.

See Back ...

If married filing separately:

Have you lived with your spouse for the last 6 months of the year?

Yes No

Have you lived with your spouse for one day during the past year?

Yes No

Filing Status – Head of Household

The IRS could require additional information/documentation if you are divorced, legally separated, or married and did not reside with your spouse the last 6 months of the year to determine if you qualify for the head of household filing status.

1. Marital Status:

- Never Married
- Spouse deceased
- Divorced, separated or spouse deceased
- Married but lived apart from spouse during the last 6 months of the year
- Separation agreement

2. If you are divorced or legally separated, can you provide the IRS with any of the following documents?

- Divorce decree: Date: _____
- Separation maintenance agreement or separation agreement: Date: _____

3. If you are married but did not reside with your spouse for the last 6 months of the tax year, can you provide the IRS with any of the supporting documents verifying that your spouse did not live with you?

- Not applicable
- Lease agreement
- Utility bills
- Letter for a clergy member
- Letter from social services
- Other supporting documentation. If so, what type of documentation? _____

4. Can you provide the IRS with receipts & bills substantiating the cost of maintenance more than half of the cost of the home? Documentation that the IRS requires to substantiate the cost of maintaining the home utilities:

- Utility bills
- Rent receipts or mortgage interest statement
- Property tax bills
- Maintenance and repair bills
- Grocery Receipts
- Other household bills

5. Did you receive any non-taxable support/income?

- Family support
- Childcare assistance
- Food stamps
- Housing assistance
- Other: _____