

## "2024" 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: \_\_\_\_\_

Name: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_ Relationship: \_\_\_\_\_

Name: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_ Relationship: \_\_\_\_\_

Name: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_ Relationship: \_\_\_\_\_

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.\***

**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: \_\_\_\_\_