

# Welcome to KMTaxOC



	Taxpayer	Spouse	
Name	_____	_____	
Occupation	_____	_____	
SS#	____-____-____	____-____-____	
Birthday	____/____/____	____/____/____	
Cell Phone	_____	_____	
Email	_____	_____	
Address	_____		
		Own or Rent	
Bank Name	_____	Routing _____	
Account #	_____	Checking Savings for your refund!	
Dependent		Birthdate	Relationship
	SS# _____	/ /	_____
	SS# _____	/ /	_____
	SS# _____	/ /	_____
	SS# _____	/ /	_____

Tell us something we didn't think to ask!

\_\_\_\_\_

\_\_\_\_\_

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Has your home address changed from last year?	Y	N
Has your marital status changed?	Y	N
Were there any changes in dependents?	Y	N
Do you pay for dependent child day care?	Y	N
Did you bring your forms 1095-A Fed & 3895 CA Covered California subsidized health care?	Y	N
Did you operate a small business?	Y	N
Did you sell, exchange, or purchase any real estate or virtual currency (Bitcoin)?	Y	N
Did you refinance any real estate?	Y	N
Did you purchase a qualified plug-in electric vehicle or install solar panels?	Y	N
Did you retire or change jobs?	Y	N
Did you receive any correspondence from the State or the IRS?	Y	N
Do you have tax returns that are unfiled or filed with balances due?	Y	N
Did anyone listed above have qualified college expenses or pay student loan interest?	Y	N
Did anyone collect Unemployment Benefits?	Y	N
If Self-Employed, did you apply for and receive a PPP Loan?	Y	N
Did you contribute to a Traditional or Roth IRA?	Y	N
<b>CARES ACT EIP STIMULUS PAYMENTS</b>		<b>March 2021 \$</b>
Did you follow estimated quarterly tax payments schedule if required to?	Y	N
Did you receive monthly Advanced Child Tax Credit Payments?	Y	N

