

Welcome to KMTaxOC



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

| Dependent | SS# | Birthdate | Relationship |
|-----------|----------------|----------------|--------------|
| _____ | ____-____-____ | ____/____/____ | _____ |
| _____ | ____-____-____ | ____/____/____ | _____ |
| _____ | ____-____-____ | ____/____/____ | _____ |
| _____ | ____-____-____ | ____/____/____ | _____ |

| | | |
|-------------------------------------|---------|--------|
| Dependent Day Care Name and Address | EIN/SS# | Amount |
|-------------------------------------|---------|--------|

Tell us something we didn't think to ask!

| | | |
|--|---|---|
| Has anyone listed above been issued an IRS Identity Protection PIN? | Y | N |
| 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 |
| Did you follow estimated quarterly tax payments schedule if required to? | Y | N |
| California Middle Class Tax Refund | Y | N |