

# Welcome to KMTaxOC



	Taxpayer	Spouse	
Legal Name	_____	_____	
Occupation	_____	_____	
SS#	____-____-____	____-____-____	
Birthday	____/____/____	____/____/____	
Cell Phone	_____	_____	
Static Email	_____	_____	Required for Signing Docs
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
Required Form 1095-A Health Insurance Marketplace	Y	N
Did you operate a small business?	Y	N
Did you sell, exchange, or purchase any real estate?	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
Do you have your estimated quarterly tax payments schedule if required to?	Y	N
Did you sell, exchange, or purchase any virtual currency (Bitcoin)?	Y	N