

Welcome to KMTaxOC

Book An Appointment Link <https://kmtaxoc.com/book-an-appointment>



Taxpayer

Spouse

Legal Name _____

Occupation _____

SS# _____ - _____ - _____

Birthdate ____ / ____ / ____

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
_____	SS# _____ - _____ - _____	____ / ____ / ____	_____
_____	SS# _____ - _____ - _____	____ / ____ / ____	_____
_____	SS# _____ - _____ - _____	____ / ____ / ____	_____
_____	SS# _____ - _____ - _____	____ / ____ / ____	_____

Dependent Day Care Name and Address	EIN/SS#	Annual Amount
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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 through Marketplace Exchange	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 or Family Leave Benefits?	Y	N
Do you receive K-1 statements from a passive investment or Trust?	Y	N
Did you contribute to a Traditional or Roth IRA?	Y	N
Do you have your detailed estimated quarterly tax payments schedule if required to?	Y	N
Did you sell, exchange, or purchase any virtual currency (Bitcoin)?	Y	N