

## REQUIRED CLIENT INTAKE FORM

Basic Info *				
Taxpayer Name:		Spouse Name:		
Address (if changed from 2023):				
Filing Status: <input type="checkbox"/> Single <input type="checkbox"/> Head of Household <input type="checkbox"/> Not sure <input type="checkbox"/> Married filing Jointly <input type="checkbox"/> Widow; Date of Spouse's passing: _____ <input type="checkbox"/> Married filing Separately <input type="checkbox"/> Dependent				
• Did you pay or receive alimony in 2024?		Yes	No	
• Did you receive any correspondence from the IRS or state in 2024?		Yes	No	
• Did you get a new license after 3/15/24?		Yes (If YES, provide copy)		No
Refund/ Tax Payment Info *				
• For refunds do you want direct deposit?		Yes	No	
• If YES, please confirm last 4 digits of account: _____		Checking	or	Savings
• If you <b>owe taxes</b> , how do you want to pay?		Auto Draft from Bank		Mail Check
Dependent Information				does not apply skip <input type="checkbox"/>
• Do you or your spouse provide financial support for anyone?		Yes	No	
• If YES, who?		My children	My parents	Other: _____
If YES, please provide details below. Prior year clients can skip starred * questions if dependent was on a previous return. For all <b>NEW dependents</b> , please provide their social security card and birth certificate.				
<b>Note:</b> Proof of address must have child's name and address (ex: school or medical/pharmacy record) and is required <b>each year</b> . Please list what you have provided as proof in proof of address section below.				
	Name:	Name:	Name:	Name:
Relationship*				
DOB*				
Provided SS Card?*				
Provided Birth Cert Copy? *				
Proof of Address				
Dependent Care				
CHET or 529 Acct # Amt contributed?				
Child's Earned or Invest. Income?				

Educational Expenses

does not apply skip

Did you pay student loan interest? Yes (submit 1098 E) No

Did you pay educational expenses? Yes (For: ) No Did you pay tuition? Yes (submit 1098 T) No

Did you receive any scholarships? Yes No

Was the education program for a: 4 year Undergraduate Degree Graduate Degree

Did you claim education credits previously? Yes No

Health & Medical

Health Insurance provided by:

Work

Marketplace (1095A)

Medicare

Veteran

Medicaid-Husky

Parent

Did you have major medical expenses? Yes (approx. amount: \$ ) No

Did you have an HSA? Yes (submit all 1099 SA) No

Did you make contributions outside of work? Yes No

Were all HSA distributions for qualified medical expenses? Yes No

Charitable Contributions

does not apply skip

Cash donations to 501c3? \$ Any contributions over \$250? Yes (receipt required) No

In-Kind or non-cash donations?

Personal Property

How many loan providers for your mortgage? (submit 1098)

How much did you pay in House Taxes? Car Taxes?

Did you add any energy upgrades to you home? Yes No

Did you purchase an energy efficient vehicle in 2024? Yes No

Investments

does not apply skip

Did you own/participate/sell any virtual currencies (i.e. Bitcoin, etc.)? Yes (if YES, call us) No

Do you have any of the following: Mutual Funds Brokerage Accounts Annuities/Pensions

Did you have a retirement account? Yes (complete questions below) No

Retirement Accounts: We made 1 or more distributions. (1099R) 5498 received We made 1 or more rollovers. (1099R) We made contributions to a retirement plan outside of work.

Employment & Other Income

How many W2's did you receive for Taxpayer: Spouse:

Did you have or run a business with self-employment income? Yes No

Did you receive other income in 2024 (ex: rentals, side-job, hobby)? Yes No

Did you pay estimated taxes in 2024? Yes (complete table below) No

	Date	Fed	State: CT	State Other:
Q1				
Q2				
Q3				
Q4	1/15/2025			