

## 2021 CLIENT PROFILE FOR TAX YEAR 2020

### **GENERAL INFORMATION**

TAXPAYER NAME: \_\_\_\_\_

CURRENT ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

BIRTH DATE: \_\_\_\_\_

SOCIAL SECURITY: \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

### **(PLEASE INCLUDE TWO NUMBERS)**

HOME/CELL PHONE NUMBER: \_\_\_\_\_

ALTERNATE PHONE NUMBER: \_\_\_\_\_

**ABOUT HOW MUCH DID YOU GET BACK ON YOUR 2019 TAXES THAT WERE FILED IN 2020?**

\_\_\_\_\_

(If filing joint, list the total 2019 federal return amount your received with your spouse.)

SPOUSE NAME: \_\_\_\_\_

BIRTH DATE: \_\_\_\_\_

SOCIAL SECURITY: \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

HOME/CELL PHONE NUMBER: \_\_\_\_\_

### **TAX INFORMATION**

ARE THE TAXPAYER AND SPOUSE LEGALY MARRIED?

YES \_\_\_\_\_

NO \_\_\_\_\_ DOES NOT APPLY \_\_\_\_\_

FILING STATUS (CHOOSE ONLY **ONE** STATUS)

SINGLE \_\_\_\_\_

MARRIED BUT FILING SEPARATE \_\_\_\_\_

HEAD OF HOUSEHOLD \_\_\_\_\_

WIDOWED \_\_\_\_\_

MARRIED FILING JOINT \_\_\_\_\_

How much did you get for stimulus # 1

(\$1,200 per adult and \$500 per dependent child under 17)

\$ \_\_\_\_\_

How much did you get for stimulus # 2

(\$600 for each adult and each qualifying child dependent in the household.)

\$ \_\_\_\_\_

## **DEPENDENTS**

NAME: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_

SSN: \_\_\_\_\_

RELATIONSHIP: \_\_\_\_\_

MONTHS IN HOME: \_\_\_\_\_

NAME: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_

SSN: \_\_\_\_\_

RELATIONSHIP: \_\_\_\_\_

MONTHS IN HOME: \_\_\_\_\_

NAME: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_

SSN: \_\_\_\_\_

RELATIONSHIP: \_\_\_\_\_

MONTHS IN HOME: \_\_\_\_\_

NAME: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_

SSN: \_\_\_\_\_

RELATIONSHIP: \_\_\_\_\_

MONTHS IN HOME: \_\_\_\_\_

NAME: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_

SSN: \_\_\_\_\_

RELATIONSHIP: \_\_\_\_\_

MONTHS IN HOME: \_\_\_\_\_

PLEASE NOTE YOUR 2020 INDIVIDUAL TAX RETURN PREPARED IN 2021 WILL BE FROM THE INFORMATION YOU HAVE PROVIDED.

WE WILL NOT AUDIT OR VERIFY THE INFORMATION FURNISHED TO US.

YOU, THE TAXPAYER, ARE ULTIMATELY RESPONSIBLE FOR THE PREPARATION AND FILING OF YOUR TAX RETURN.

IN THE EVENT YOU LISTED A SPOUSE, PLEASE NOTE THAT EVEN THOUGH A SIGNATURE IS NOT REQUIRED BY THEM ON THE CLIENT PROFILE, THEY ARE REQUIRED TO VERIFY THE INFORMATION LISTED ON THE RETURN BY SIGNING IT BEFORE IT CAN TRANSMIT TO THE IRS.

I, THE TAXPAYER NAMED ABOVE, HAVE PROVIDED THE TAX PREPARER THE ATTACHED TAX INFORMATION TO THE BEST OF MY KNOWLEDGE. THIS INFORMATION IS TRUE, CORRECT AND COMPLETE.

**TAXPAYER SIGNATURE:**

\_\_\_\_\_

## **TAX DECLARATION**

**PLEASE ANSWER EACH QUESTION BELOW WITH; YES, OR NO.**

1. Have/Will you provide photocopies of you and or spouse driver's license and social security card and social security card for all dependents on the return? \_\_\_\_\_
2. Do you/spouse/ or any dependent have an IP PIN Number? \_\_\_\_\_  
If yes, please list. \_\_\_\_\_
3. Have or will you provide all the W2's for all the jobs you worked at? \_\_\_\_\_
4. Are you legally married based on your state's legal definition of marriage? \_\_\_\_\_
5. If yes, did your spouse live in your home at any time during July through December? \_\_\_\_\_
6. Can someone else claim you/spouse as a dependent? \_\_\_\_\_
7. Did you/spouse receive any kind of military pay earnings? \_\_\_\_\_
8. Did you/spouse receive any self-employment income? \_\_\_\_\_
9. Did you/spouse receive income from rental property? \_\_\_\_\_
10. Did you/spouse receive unemployment income? \_\_\_\_\_
11. Did you/spouse receive any money from the sale of stocks? \_\_\_\_\_
12. Did you/spouse receive any Social Security Income? \_\_\_\_\_
13. Did you/spouse take any money from your 401K? \_\_\_\_\_
14. Did you/spouse or any dependents have health insurance through the marketplace? (If yes please explain.) \_\_\_\_\_
15. Did you/spouse pay any childcare expenses? \_\_\_\_\_
16. Did you/spouse or any dependents on the attend college? \_\_\_\_\_
17. Do you/spouse have any mortgage interest? \_\_\_\_\_
18. Did you/spouse file taxes in 2019? \_\_\_\_\_

19. Do you/spouse owe any money to the IRS? \_\_\_\_\_

20. Do you/spouse owe any state taxes? \_\_\_\_\_

21. Have you/spouse received any letters from the IRS? \_\_\_\_\_

22. Did you / or anyone in your household have insurance through the marketplace? \_\_\_\_\_ If yes, were you provided 1095-C tax document? \_\_\_\_\_

23. Did you purchase an electric vehicle in 2020? \_\_\_\_\_ If yes what is the year/make and model and tentative credit issued by the manufacturer? \_\_\_\_\_

I declare that I understand the above questions [numbers 1 through 23] and have answered them truthfully to the best of my ability.

**TAXPAYER SIGNATURE:**

\_\_\_\_\_

**PLEASE ANSWER EACH STATEMENT BELOW WITH: YES, NO**

I would like to receive my federal refund by check. \_\_\_\_\_

I would like to receive my federal refund by direct deposit. \_\_\_\_\_

**IF YOU LISTED "YES" BY DIRECT DEPOSIT PLEASE LIST YOUR BANKING INFO BELOW. IF YOU LISTED "NO" PLEASE PUT "N/A" IN THE SPACES LISTED FOR BANK INFO BELOW.**

BANK NAME: \_\_\_\_\_

BANK ROUTING NUMBER: \_\_\_\_\_

BANK ACCOUNT NUMBER: \_\_\_\_\_

I would like to receive my federal refund as an advance. \_\_\_\_\_

If you selected yes, please inquire with your local branch for more details.

**TAXPAYER SIGNATURE:**

**DATE SIGNED:**

\_\_\_\_\_

\_\_\_\_\_