**2022 Client Information Sheet- Date\_\_\_\_\_\_\_\_\_\_\_\_**

**Your First Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_MI\_\_\_Last\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ DOB\_\_\_\_\_\_\_\_\_\_ SS#\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Spouse’s Full Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_MI\_\_\_Last\_\_\_\_\_\_\_\_\_\_\_\_\_\_ DOB\_\_\_\_\_\_\_\_\_ SS#\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ City \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_\_\_\_\_\_\_ (Own or Rent)

Cell Phone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Spouse’s Cell \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Home Phone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Spouse email\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Circle Preferred Communication (Email or Call) (Taxpayer or Spouse) -Circle preference**

Your Occupation \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Spouses Occupation \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Copies of Driver’s License required (Front & Back)**

**How Did you hear about us…?** Internet/website \_\_\_\_\_\_\_\_ Relative Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Drive by\_\_\_\_

Co Worker's name\_\_\_\_\_\_\_\_\_ Friend Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Radio \_\_\_\_ Yellow Pages \_\_\_\_\_ Other \_\_\_\_\_\_\_\_\_\_\_

**If you are due a refund, do you want Direct Deposit to your bank account? Y or N (need voided check or fill out info)**

**If you are PAYING IN, do you want Direct Debit from your bank account? Y or N (need voided check or fill out info) Other options: Mail Check or Pay online (circle one if you do not want direct debit)**

Bank Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Routing # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Checking or Savings **(Circle One)**

Account # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (must be an account with the taxpayer’s name; both if joint)

**Filing Status:**

\_\_\_\_\_Single ……. Can someone else Claim you? Y N Not Sure

\_\_\_\_\_Married filing jointly

\_\_\_\_\_Married filing Separate (Spouse’s name) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SS# \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_Surviving Widow(er) (w/ dependent child)

\_\_\_\_\_Head of Household (unmarried with dependents)

**Dependents:** List children living with you age 18 or younger. (If child is age 19 through 23 and attends school full time for at least 5 months during the year, place an “s” after the name to denote student)

**First Name Mid Int Last name SS# DOB relationship months live any**

**To taxpayer in home 2022 college**

**Other dependent:** (list mother, father, child not listed above, etc)

First Name Mid Int Last Name Relationship Age S.S.# Gross Income #months

**Education Cost** (check if applies) **Events throughout the year** (check if applies)

**\_\_\_ Paid student loan interest \_\_\_ Change in number of dependents**

**\_\_\_ Paid college tuition/ course materials (See Website) \_\_\_ Married/Divorced/Spouse died (circle one)**

**\_\_\_ Education IRA Contribution - 529 plan \_\_\_ You, spouse, or Dependent reached age 65**

**\_\_\_ Teacher paid for classroom supplies \_\_\_ Put Money into an IRA or Roth IRA**

**\_\_\_ Bought or refinanced a home (copy of closing statement)**

**\_\_\_ Sold home or property (Need copy of closing statement)**

**OTHER \_\_\_ Daycare expenses (Need Name, address, and ID# and**

**\_\_\_ Energy Credits (See Website) amount per child)**

**\_\_\_Bought, or sold virtual currency**

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**Income Checklist (Check all that applies to you)**

\_\_\_\_\_ W2’s

\_\_\_\_\_1099s from interest, dividends, pension payments

\_\_\_\_ Social Security or Unemployment statements (Need 1099’s)

\_\_\_\_ Brokerage statements (Need full statements- uploading them is appreciated)

\_\_\_\_ K-1 from partnerships, s corps, estates, and trusts

\_\_\_\_ Self-employment Income and Expense (Must Be Totaled)

\_\_\_\_Rental income and expense summary (Must Be Totaled)

\_\_\_\_ other income

**Deductions (most common )**

\_\_\_\_ Child Care (need Provider Name, Address and SSN or EIN Number, & Amount by Child)

\_\_\_\_ Student Loan Interest

\_\_\_\_ Teacher expenses

\_\_\_\_ College Information (personal or Dependent) 1098T, 1099Q, Books and dorm exp

**Other Information**

\_\_\_ IRS PIN #

\_\_\_ HSA Information (Form 1099SA For withdrawals/ Form 5498 if self-Contribution)

\_\_\_ Estimates Paid in (will need Amounts and dates)

**\*\*\*Payment options for our services: Card, Check or Cash (preferably check or cash)**

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