

2023 New Client Information Sheet-

Date _____

Your First Name _____ MI _____ Last _____ DOB _____ SS# _____

Spouse's Full Name _____ MI _____ Last _____ DOB _____ SS# _____

Mailing Address _____ City _____ State _____ Zip _____ (Own or Rent)

COUNTY _____ School Dist _____

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 _____

Previous preparer _____ **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 To taxpayer	months live in home 2023	any 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)

- _____ Paid student loan interest
- _____ Paid college tuition/ course materials (See Website)
- _____ Education IRA Contribution- 529 plan
- _____ Teacher paid for classroom supplies

OTHER

- _____ Energy Credits (See Website)
- _____ Bought, or sold virtual currency
- _____ ACTIVE Volunteer Firefighter (NY ONLY)- Will need dept name and address

Events throughout the year (check if applies)

- _____ Change in number of dependents
- _____ Married/Divorced/Spouse died (circle one)
- _____ You, spouse, or Dependent reached age 65
- _____ 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)
- _____ Daycare expenses (Need Name, address, and ID#)

Income Checklist (Check all that applies to you)

- W2's (How Many? ____)
- 1099R's (How Many? ____)
- 1099s from interest, dividends
- 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/Credits (most common, not everyone can use all of these)

- Child Care (need Provider Name, Address and SSN or EIN Number, & Amount by Child)
- Student Loan Interest
- Teacher expenses (Amount ____)
- College Information (personal or Dependent) 1098T, 1099Q, Books and dorm exp
- Mortgage Int, Property and School Taxes

Other Information

- IRS ID Protection PIN # _____ (You have to apply for it every year)
- HSA Information (Form 1099SA For withdrawals/ Form 5498 if self-Contribution)
- Estimates Paid in 2023 (will need Amounts and dates)
- Healthcare from the Marketplace (Will need 1095A)

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