**Walrath Tax Service LLC -Updated information 2022 taxes**

**Client Name(s) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_  
~Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_City\_\_\_\_\_\_\_\_\_\_\_\_ State\_\_\_\_\_ Zip\_\_\_\_\_\_\_\_\_**

**(County)\_\_\_\_\_\_\_\_\_\_\_\_\_(School District) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Occupation\_\_\_\_\_\_\_\_\_\_\_ Spouses Occupation \_\_\_\_\_\_\_\_\_\_\_\_\_\_  
  
~Best number to reach you at? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (TP or Spouse)  
~Best Email address to use \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (TP or Spouse)**

**~Any Major changes in 2022 (marriage/divorce, kids, college, bought house, retired…. etc.)**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (if married or divorced, did name change?)**

**~Did you have unemployment? Y\_\_\_\_\_ N\_\_\_\_\_\_ (Need 1099G Form)**

**~Do you have any virtual currency? (Bought, sold, exchanged)** Y\_\_\_\_ N\_\_\_\_  
  
**~ Do you have an IRS Pin number? Y\_\_\_\_ N\_\_\_\_\_**

**~For Direct Deposit or Direct Debit, (for IRS or State Taxes) please provide bank account information? (If new please provide voided check or copy of check) (savings or checking)**  
  
**Routing # \_\_\_\_\_\_\_\_\_\_\_\_ Account #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Bank Name\_\_\_\_\_\_\_\_\_\_\_\_**

**~If You owe money to the IRS or NYS, how do you want to pay- Mail check, IRS Website or directly taken out of your account?**

**~Has your Driver’s license expired or changed (i.e....renewed, enhanced, lost…etc.?) If so, we need a copy of your Driver’s License (FRONT AND BACK)**

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

OVER --🡪

**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)