

Updated Client Information for 2023 Taxes

NO APPT___ OR APPT (DATE AND TIME)_____

Client Name(s) _____ Date _____
~Address _____ City _____ State _____ Zip _____
(County) _____ (School District) _____

Best way to contact---- Taxpayer or Spouse, Email or Phone

Taxpayer Phone _____ Spouse Phone _____ (Home) _____
Email _____ Spouse email _____
Occupation _____ Spouses Occupation _____

~Any Major changes in 2023 (marriage/divorce, kids, college, bought house, retired, job change. etc.)
_____ (if married or divorced, did name change?)

(If new dependent, we need SSCard and Birthdate)

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

~Are you a Active Volunteer Fire fighter? Y _____ N _____ **(APPLYS TO NY ONLY)**

~Do you have any virtual currency? (Bought, sold, exchanged) Y _____ N _____

~ Have you had an IRS ID Protection Pin number in the past? Y _____ N _____

(You have to apply for it every year) IRS ID Protection PIN # _____

~Has your bank account changed? Y _____ N _____ **(If yes, please provide info)**

Routing # _____ Account # _____ Bank Name _____ (Cking or Savings)

~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)

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 & Expenses in categories)
- Rental income and expense summary (Must Be Totaled & Expenses in categories)
- 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, dorm exp, college invoice
- Charitable Donations
- Mortgage Int, Property and School Taxes
- Energy Credits- Windows, doors, insulations, furnace, hot water, solar..etc.. Go to our website for more information

Other Information

- 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)**