

____ NEW ____ RETURNING 2023



Status: Single ____ (not married)	Married ____	Separated ____ (living apart)	Head of Household ____ ↗ (supporting children in your home) ↖	Widow(er) ____
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Taxpayer Name:	Spouse Name:
SSN:	SSN:
B-Date:	B-Date:
Occupation:	Occupation:
Mailing Address:	
Best Phone# to reach you:	
eMail address:	
<i>You may either provide a copy of your Driver's License or fill in the information below:</i>	
Taxpayers DL#:	Spouses DL#:
State:	State:
Issue date:	Issue date:
Expiration:	Expiration:

Dependents

Full Name:	Full Name:
Relationship	Relationship:
School attended:	School attended
# months lived in your home:	# months lived in your home:
<i>If you are a NEW client we need birthdate and social security number for dependents</i>	
B-Date:	B-Date:
Social:	Social:

Full Name:	Full Name:
Relationship	Relationship
School attended:	School attended:
# months lived in your home:	# months lived in your home:
<i>If you are a NEW client we need birthdate and social security number for dependents</i>	
B-Date:	B-Date:
Social:	Social:
**Is there a possibility another person could Qualify to claim your child/children? Yes No	

Direct Deposit Information for Refunds

Bank Name:	Account #:
Routing #:	Checking or Savings?
It's best to enclose printed documentation to avoid errors. Once transmitted this cannot be fixed!	

Would you like to have your tax prep fees withheld from you refund? YES NO
(EPS Financial & Drake Software charge \$63.00 for this service, WE do not charge any extra)
If YES, we need your mother's maiden name (used for security question): _____
Also need **unexpired** copy of (both) driver license for this service.

Please Answer Questions on Reverse Side. Sign and Date.

2023

Please check Yes or No to all the following Questions

YES NO

		Were you widowed, married, divorced or separated this past year? If yes, give date. _____
		Did any of your dependents graduate high school or college in 2023? If yes you can possibly still claim.
		Did you pay Day Care expenses? Possible credit. \$_____ To whom: _____
		(**Military Only:) Did you PCS in 2023?
		Is anyone on your return currently in their first 4 years of college? If yes, possible Credit available need students 1098T. Did student get military assistance?
		Did you earn interest or dividends on checking or savings accounts? If yes, attach 1099(s).
		Did you contribute money to a Smart529 or any other WV Prepaid Tuition Plan?
		Did you make any withdrawals from an IRA or 401k? Do you have the 1099 for that transaction? It's taxable!
		Did you or your spouse contribute to a Traditional IRA Acct or a Roth? (not 401k)
		Did you "roll over" a retirement plan into another plan? Do you have the 1099?
		Did you receive a Schedule K-1 from a partnership, S Corporation, or Trust? If so, please attach.
		Did you or your spouse receive any Social Security Benefits in 2023? If yes, attach form(s) SSA-1099.
		Did you receive any type of prize, award or gambling winnings? Attach W2G's
		Did you receive any Unemployment in 2023? Enclose Form 1099G from state.
		Did you receive or pay alimony established in a divorce decree prior to 12/31/2018? Amount Paid: \$_____ To whom & SSN: _____ Amt Received \$_____
		Do you have any Investment Accounts? If yes, have you received your 1099 consolidated statement enclosed?
		If applicable, have you enclosed your 1095A from Healthcare.gov?
		Have you ever been disallowed Earned Income Credit or the Child Tax Credit?
		Did you make any estimated tax payments for 2023? (please write dates and amounts if not done through us) Federal Date/Amount: _____ State Date/Amount: _____ Federal Date/Amount: _____ State Date/Amount: _____ Federal Date/Amount: _____ State Date/Amount: _____ Federal Date/Amount: _____ State Date/Amount: _____

Signature

Date

Do you request a specific preparer? NO YES

Wendy Cindy Jeane Carly Marilyn Jennifer Christi Clarissa(CJ)