

____ NEW ____ RETURNING



Status: Single ____ (not married)	Married ____	Separated ____ (living apart)	Head of Household ____ ^ (supporting children in your home) ^	Widow(er) ____
---	--------------	----------------------------------	--	----------------

Taxpayer Name:		Spouse Name:	
B-Date:	SSN:	B-Date:	SSN:
Occupation:		Occupation:	
DL#:	State Issued:	DL #:	State Issued:
DL Issue Date:		DL Issue Date:	
DL Exp Date:		DL Exp Date:	
Full Mailing Address:			
Best Phone # to reach you:			
eMail Address:			

- New Clients **MUST** provide a copy of their Valid Driver License or Photo ID
- New Clients **MUST** provide Copies of Social Security Cards for Taxpayer, Spouse, and All Dependents

Dependents

Full Name:	Full Name:
B-Date:	B-Date:
SSN:	SSN:
Relationship:	Relationship:
School attended:	School attended:
# of months lived with you in 2022:	# of months lived with you in 2022:

Full Name:	Full Name:
B-Date:	B-Date:
SSN:	SSN:
Relationship:	Relationship:
School attended:	School attended:
# of months lived with you in 2022:	# of months lived with you in 2022:
**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?
Enclose a Voided Check, Copy of your Account Card or Other Printed Documentation	

In any month was any person on this Tax Return covered by "Obama Care"?
If yes, we MUST have your Form 1095A from the Market Place (Healthcare.gov)
****Anyone covered by "Obama Care" for even 1 month in 2022 must have a 1095A to file taxes.**
The IRS will delay your refund if this information is not included.

* If you would like to have your Tax Prep Fees withheld from your refund or to apply for a Refund Advance Loan, you must have an Unexpired State ID and we will need your Mother's Maiden Name. Ask Receptionist for Details.

Please Answer Questions on Reverse Side. Sign and Date.

2022

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 2022? If yes you can possibly still claim.
		Did you pay Day Care expenses? Possible credit. \$_____ To whom: _____
		(**Military Only:) Did you PCS in 2022?
		(**Military Only) Did you receive any Military Tuition assistance, such as the GI Bill?
		Is anyone on your return currently in their first 4 years of college? If yes, possible Credit available need students 1098T
		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 take 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 2022? 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 2022? 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?
		Have you ever been disallowed Earned Income Credit or the Child Tax Credit?
		Did you make any estimated tax payments for 2022? (please write dates and amounts if not done thru 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)