



CLIENT INFO SHEET
TAX YEAR _____

Taxpayer Name _____ Spouse Name _____

Occupation _____ Occupation _____

SSN _____ DOB _____ SSN _____ DOB _____

Phone _____ Phone _____

Email _____ Email _____

ADDRESS _____ Lived all year? _____

Driver's License # _____ State _____ Issue Date _____ Expiration Date _____

Driver's License # _____ State _____ Issue Date _____ Expiration Date _____

Dependent Names	Birthdate	Social Security #	Relationship	Months lived in Your Home

DEPENDENTS: Any childcare or afterschool care expenses? _____

Did anyone including taxpayer or spouse attend college? _____

Do you or your spouse have healthcare through the Healthcare Marketplace? _____

Did you pay any Estimated Taxes to the IRS or State for this tax year? _____ Federal \$ _____ State \$ _____

Are you or your spouse Self Employed, have an LLC or Corporation? _____

If so, please supply information as follows:

BUSINESS NAME	EIN#	ENTITY TYPE: (Sole Proprietor, Single Member LLC, Multi-Member LLC (Partnership), S Corp or C Corp

Would you like any refunds deposited into your bank account?

BANK NAME	ROUTING#	ACCOUNT#	CHECKING or SAVINGS ACCT

A \$50 deposit is required to start your return. Cash, Check, Debit/Credit card or Zelle. Zelle payments to kdlsvcs@gmail.com
There is a 4% convenience fee if paid by debit/credit card and 2% for ACH.

CHECK ALL THAT APPLY

W2s	Purchased Primary Residence	Medical/Dental Expenses
1099 MISC/NEC	Sold Primary Residence	Mortgage Interest Statement 1098
Received Interest 1099-INT	Owned Rental Property	Paid Real Estate Taxes
Received Dividends 1099-DIV	Lottery or Gambling Winnings – W2G	Cash Contributions
Sold Stocks or Bonds	Cancellation of Debt 1099-C	Non-Cash Contributions
Pension/Retirement Income 1099-R	Paid Tuition 1098-T	HSA Form 1099SA
Contributions to IRAs	Paid Student Loans 1098-E	
Received Unemployment 1099-G	Virtual Currency	
Social Security Income 1099-SSA	Child Care Expenses	
Alimony (PAID OR RECEIVED)		