

MJ Cares Data Sheet

Tax Year 2023



TAXPAYER NAME _____ (M / F) SPOUSE NAME _____ (M / F)
 SSN _____ DISABLED Yes No SSN _____ DISABLED Yes No
 DOB _____ OCCUPATION _____ DOB _____ OCCUPATION _____
 EMAIL _____ EMAIL _____
 ADDRESS _____ APT # _____
 CITY _____ STATE _____ ZIP _____
 MAIN PHONE _____ CELL ALT. PHONE _____ CELL

MJ Cares will occasionally contact you by using technology. By checking the box on this form, you **DO NOT** give us consent to use automated technology to email, call or text you at the phone number(s) above, including your wireless number if provided.

WE NEED A COPY OF:

- 1) **Driver's License** or Photo ID
- 2) **Social Security Cards** for taxpayer and spouse
- 3) **Birth certificate and Social Security Cards** for dependents

Are you claiming any dependents? Yes No

If yes, fill out a **DUE DILLIGENCE** sheet for all sections that apply.

Your Return is # _____ in Que.

I need my return **RUSHED** and I will pay a **FEE to skip the Que line!**

_____ \$50 Personal Return

_____ \$100 Business Return

| Dependents: (List Youngest First) Name (First, Initial and Last Name) | Month, Day & Year of Birth | Dependent's SSN | Relationship to you | Childcare or College Student | Income earned in 2023 (not SSI) | Months lived in your home this year? |
|--|-------------------------------|--------------------|------------------------|---------------------------------------|--|---|
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CHILDCARE INFORMATION: (This is required for EACH CHILD & EACH PROVIDER or give copy of Year-End Receipt)

Provider's Name _____ Provider's SSN/EIN _____
 Provider's Address _____ Amount Paid to Provider \$ _____
 Provider's Name _____ Provider's SSN/EIN _____
 Provider's Address _____ Amount Paid to Provider \$ _____

**List any more providers on the back.

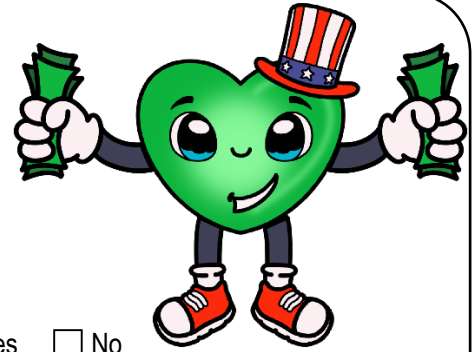
COLLEGE STUDENT INFORMATION:

Did you have **Education Expenses**? 1098-T, books, Computer, etc. Yes No
If YES, give receipts or write expenses in "Other" Section on back. You can get 1098-T from your STUDENT ACCOUNT.

Did the **Student Support** themselves? (pay more than half of their living expenses) Yes No

Did you make **Student Loan** payments? **1098-E** Yes No

TAX YEAR 2023 SPECIFICS:



Can someone **Claim You as a Dependent**? Yes No

Did you **Live Apart from your Spouse** for over 1/2 the year? Yes No

Did the **IRS send you a PIN number** Yes _____ No

Did you **Move or Sell a property**? Yes No

Did you install **Clean Energy** such as Solar, Wind or Geothermal or Fuel Cell System? Yes No

Did you purchase **Energy Efficient Improvements for your home** such as Windows, Doors, Sky Light, Insulation, Furnace, Water Boiler, Central AC, Heat pump, Water Heater, Boiler, Biomass stove / boiler? Yes No *If Yes, please provide receipts.*

Did you purchase a New or Used **Plug-In Vehicle**? Yes No *If Yes, Need dealership paperwork.*

Did you have any **Unreimbursed Employee Expenses** (Union dues, Scrubs, Tools, etc.)? Yes No

If YES, give receipts or write expenses in "Other" Section below.

Did you **Pay Estimated Taxes**? Yes No

Federal \$:

State \$:

Local \$:

1Q _____

1Q _____

1Q _____

2Q _____

2Q _____

2Q _____

3Q _____

3Q _____

3Q _____

4Q _____

4Q _____

4Q _____

Are you **Self-Employed**? Yes No *If yes, fill out a **DUE DILLIGENCE** sheet.* Title: _____

Business Name: _____ Date Business Started: _____

Type of Business: Sole Proprietor Partner LLC S-Corp C-Corp Trust

Business Description: _____ EIN: _____ - _____

How would you like to PAY for your Tax Service? Card Check Cash Pay By Refund

Would you like to receive your Tax Return electronically ONLY? Yes No

How would you like to PAY the IRS? Auto Debit from Return Check with Voucher Payment Plan

How would you like to RECEIVE your Tax Refund? DISCOVER FasterMoney Card Check Direct Deposit

BANKING INFORMATION: Checking Savings

Bank Name _____ Routing Number _____ Account Number _____

OTHER Information: _____

I CERTIFY THAT I WOULD LIKE MY TAXES PREPARED ACCORDING TO THE INFORMATION I SUPPLIED.

Taxpayer's Signature _____

Date _____

Spouse's Signature _____

Date _____