

Business Name:	
Taxpayer Name:	
Taxpayer SSN/ITIN:	
Address:	
City, State, ZIP:	
Filing Status:	
Occupation:	
Business Name:	
What is your current address?	
Did your marital status change before the end of last year?	
Were there any changes in dependents?	
Did you have any child or dependency care expenses? Please include care provider's name, address, SSN, and amount.	
Did you buy or sell stocks, mutual funds, bonds, or other investment properties?	
Did you donate money, clothes, cars, or stock?	
Did you incur any tuition or continuing education expenses?	
Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)?	

Did you and your dependents have health care coverage for the full-year?	
Did you receive any of the following IRS documents? Form 1095-A, 1095-B, or Form 1095-C? If so, please send.	
For direct deposit, please provide your bank name, routing number, and account number.	
Do you want to electronically file your tax return?	
1099-COMP from your financial institution(s)	
W-2G from your gambling winnings	
1099-R from your Pension or Retirement provider	
RRB-1099 from the Railroad Retirement Board (RRB)	
SSA-1099 from the Social Security Administration	
1099-Misc from Other Income sources	
1099-Q from Qualified Education Programs	
1099-B from Broker and Barter Exchange Transactions	
K-1 from your Partnerships	
K-1 from your S-Corporation	
K-1 from your Trusts or Estates	
1098 from your bank or lender	

1099-G from the government	
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