

Tax Intake Form

Tax Consultation Intake Form

* Required

1. **Email address ***

2. **Did you file last year taxes?**

Mark only one oval.

Yes

No

Maybe

3. **Please upload a copy of your W-2's, 1099's or any source of income**

Files submitted:

4. **please upload a copy or your previous year taxes**

Files submitted:

5. **please upload your Identification card or drivers License, and you social security card, w-2's, 1099's and any supporting documentation.**

Files submitted:

Untitled Section

6. **Social Security Number**

7. **Name: First, Middle Initial & Last**

8. **Date of Birth**

Example: December 15, 2012

9. **Date of Death**

Example: December 15, 2012

10. **Work Phone**

11. Occupation

12. Cell/Other Phone

13. Legally Blind?*Mark only one oval.* Yes No Other:

14. Dependent of Other?*Mark only one oval.* Yes No Other:

Spouse

If you have a spouse complete

15. Email

16. Social Security Number

17. Name: First, Middle Initial & Last

18. Date of Birth

*Example: December 15, 2012***19. Date of Death**

*Example: December 15, 2012***20. Work Phone**

21. Cell/Other Phone

22. Occupation

23. Legally Blind?*Mark only one oval.*

Yes

No

Other:

24. Dependent of Other?*Mark only one oval.*

Yes

No

Other:

25. Comments

Address**26. Address**

Filing Status**27. Select Filing Status ****Mark only one oval.*

Single

Married Filing Joint

Married Filing Separately

Head of Household

Qualifying Widower

Other:

Dependents

28. First, Middle Initial, Last Name(s)

29. Date of Birth(s)

30. Social Security Number(s)

31. Relationship

Dependents

32. *Mark only one oval.*

Option 1

33. *Mark only one oval.*

Option 1

34. *Mark only one oval.*

Option 1

35. *Mark only one oval.*

Option 1

36. **please upload any w-2's 1099's or supporting information.**

Mark only one oval.

Option 1

37. **First, Middle Initial, Last Name(s)**

38. **Date of Birth(s)**

39. **Social Security Number(s)**

40. **Relationship**

Dependents

41. First, Middle Initial, Last Name(s)

42. Date of Birth(s)

43. Social Security Number(s)

44. sRelationship

45. What is the name of your bank

46. What is your bank accounts routing number
