

# EPCO Tax & Accounting New Client Intake Sheet

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*We will require a copy of your Social Security Cards and Driver's License before e-filing.*

**Taxpayer #1 (Husband)**

Name: \_\_\_\_\_

Birth Date: \_\_\_\_\_

Social Security #: \_\_\_\_\_

Street Address: \_\_\_\_\_

City \_\_\_\_\_ Zip: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Best time to call: \_\_\_\_\_

Email: \_\_\_\_\_

Dependants:

Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Social Security #: \_\_\_\_\_

Relationship: \_\_\_\_\_

Can dependent be claimed by anyone else?

Y or N : Who? \_\_\_\_\_

Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Social Security #: \_\_\_\_\_

Relationship: \_\_\_\_\_

Can dependent be claimed by anyone else?

Y or N : Who? \_\_\_\_\_

Did the child you are claiming as a dependent reside with you at least 183 Nights of 2025 (more than half the year)?  
Y or N

Did you provide at least 50% of their living expenses? Y or N

Personal Bank account:

New Routing #: \_\_\_\_\_

New Account #: \_\_\_\_\_

**Taxpayer #2 (Wife)**

Name: \_\_\_\_\_

Birth Date: \_\_\_\_\_

Social Security #: \_\_\_\_\_

Street Address: \_\_\_\_\_

City \_\_\_\_\_ Zip: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Best time to call: \_\_\_\_\_

Email: \_\_\_\_\_

Tax Return copy: Digital Return or Paper

Business Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

City \_\_\_\_\_ Zip \_\_\_\_\_

***Bring Documents required:***

Balance sheet/Income statement/Trial balance/Payroll summary/Mileage Log

Equipment Purchased: Y or N (Provide Receipts)

Equipment Sold: Y or N (Provide Dates and Amounts)

Business Bank Account:

New Routing #: \_\_\_\_\_

New Account #: \_\_\_\_\_

***Checklist:***

Did you Rent or Own?

# EPCO Tax & Accounting Client Check Sheet

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**Own: (Provide 1098 Mortgage Statement)**

Was your mortgage used to buy or improve your home? **Y or N**

Did you make Energy Efficient household improvements in 2025? **(Provide Receipts)**

**Y or N**

List what: \_\_\_\_\_

Did you refinance a home this year? **Y or N**

**Rent:**

Landlord's Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Rent/Month: \_\_\_\_\_

How many months lived there in 2025? \_\_\_\_\_

**Childcare Expenses: (Provide Childcare letter)**

Provider's Name: \_\_\_\_\_

Address: \_\_\_\_\_

TID#: \_\_\_\_\_

Did child attend college? **(Provide Form 1098T)**

**Y or N**

Expenses: Y or N **(Provide documentation)**

Did student claim themselves on a return?

**Y or N**

Did child attend a private school / homeschool?

**Y or N**

**Income:**

Did you receive TIPS Y or N; What kind of service? \_\_\_\_\_

Did you receive overtime? Y or N **(Provide last check stub)**

*Time in a half OR Double Time?*

Any foreign accounts over \$10K? **Y or N**

Do you have investments? **(Provide Broker Statements/1099R)**: Retirement / Pension / Other

Do you have 529 plans? **Y or N (Provide 529 Statement)**

Did you do any virtual currency trading? **Y or N**

Did you receive a **1099 K**? **Y or N**

What activity was it generated from?

Did you have any cancellation of debt during 2025? **(Provide 1099C)** **Y or N**

**Rental Property:**

Monthly income: \_\_\_\_\_

Did you have expenses: **Y or N (Provide documents)**

# of days rented \_\_\_\_\_

# of days available for rent \_\_\_\_\_

# of days under repair \_\_\_\_\_

# of days of personal use \_\_\_\_\_

How did you hear about us?

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