

Check-in for Tax Year 2023

rev 1/24

Name _____

Referred by _____

BEST way to contact you? (Email OR Phone Number) _____

Part 1: Indicate which of the following items pertain to your tax information

YES

Included documents to prepare a tax return for someone **OTHER THAN YOURSELF/SPOUSE**.
(Ex: son, daughter, mom, dad, etc) : _____

Included documents for a tax return **prior to 2023** to be reviewed, prepared or amended.

Included documents for my corporation or other activity that requires a **SEPARATE** tax return.
(LLC, business, Trust, business property tax listing) Indicate: _____

Included a memory stick containing information to use for my tax return.

Included a memory stick with a QuickBooks file: version _____ (pw: _____)

YES NO

Direct **Deposit** my refund(s).

Direct **Draft** my tax payment(s).

Use the same bank information as last year **-OR-** enter new bank information here:
(or provide a voided check)

Name of Bank

Routing Number

Account Number

Indicate which apply to you. ****You must sign and date to verify the declaration.****

For the Year January 1, 2023 to December 31, 2023, I had/have:

No virtual currency transactions. **- OR -** Included my virtual currency transactions.

No foreign bank accounts. **- OR -** Included information on my foreign bank accounts.

Your signature

Date

I have subsidized health insurance and included my **FORM 1095-A**. (Form 1095-B, -C are **NOT** required)

I may want to make a retirement plan contribution (IRA, ROTH, SEP, 401(k)) before the deadline.
Please let me know my options. _____

your email

I have included my IRS provided IP (Identity Protection) PIN number(s) for my 2023 tax returns.

I have **additional** documents to bring in.
(ex: corrected investment statement, K-1s, rental property information, etc.)

****Please indicate what are they and when you expect to get them.****

Part 2: Indicate if any of the following pertain to you for 2023

- | | |
|---|---|
| <input type="checkbox"/> Bought or Sold real estate
<i>** (Include HUD-1(s) or settlement statements)**</i> | <input type="checkbox"/> Paid or Received alimony
Total Amount \$ _____ |
| <input type="checkbox"/> Sold stock or other investments
Brokerage annual statement or report | <input type="checkbox"/> Got Married / Divorced / Separated / Remarried
Indicate which and date occurred: _____ |
| <input type="checkbox"/> Own a business or have rental property
Income and expenses | <input type="checkbox"/> Made estimated tax payments
<i>** (Include how much was paid and dates of payments)**</i> |
| <input type="checkbox"/> Paid college expenses
Form 1098-T from the school | <input type="checkbox"/> Moved to a new address
Date of Move: _____ |
| <input type="checkbox"/> Received retirement or pension benefits
Form 1099-R for each | <input type="checkbox"/> Retired or Moved to a retirement facility
Date Occurred: _____ |
| <input type="checkbox"/> Received a Form 1099-K.
Explain why you recieved a 1099-K | <input type="checkbox"/> Became Disabled or Deceased
Date Occurred: _____ |
| <input type="checkbox"/> Paid daycare expense for dependent.
Name, address, tax ID number, amount | <input type="checkbox"/> Had large medical expenses / nursing home care |
| <input type="checkbox"/> Contributed to IRA / ROTH / SEP, etc | <input type="checkbox"/> Contributed to an HSA (Other than through work) |

Part 3: NEW CLIENTS - Fill out completely.

RETURNING CLIENTS - *Only fill in if any changes occurred during 2023.*****

Name (first, mi, last)	Social Security Number	Date of Birth	Occupation
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Spouse Name (first, mi, last)	Social Security Number	Date of Birth	Occupation
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Home address (street, city, state, zip)

Your Dependents (children and others living in your household)

Name (first, mi, last)	Social Security Number	Date of Birth	Relationship to you
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Name (first, mi, last)	Social Security Number	Date of Birth	Relationship to you
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Name (first, mi, last)	Social Security Number	Date of Birth	Relationship to you
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Contact Information

Your work phone	Your cell phone	Spouse work phone	Spouse cell phone	Home phone
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Your email address

Spouse email address

Part 4: Review tax returns *BE SURE WE HAVE YOUR CORRECT EMAIL ADDRESS*****

YES NO

- Email a copy **FOR REVIEW** before finalizing.

Part 5 : Final tax return - indicate how you would like a copy of your final returns.

(you may choose more than one)

- | | |
|--|--|
| <input type="checkbox"/> Print a paper copy - I will pick up | <input type="checkbox"/> Email a pdf copy of the final return |
| <input type="checkbox"/> Print a paper copy - mail to me | <input type="checkbox"/> Put a pdf copy on the memory stick provided |

*** (charge for postage will be added to your bill) ***