



Filing Status

Tax Year: _____

☐ Married Filing Jointly

☐ Head of Household

☐ Single

☐ Married Filing Separately

☐ First Year Widowed with Children

Client Information

Taxpayer

Social Security Number

Full Name (as appears on SSN Card)

Date of Birth

Email Address

Phone Number

Occupation

Spouse

Social Security Number

Full Name (as appears on SSN Card)

Date of Birth

Email Address

Phone Number

Occupation

Home Address

City

State

ZIP Code

Account Number

Routing Number

Account Type

Dependents

1

Social Security Number

Full Name (as appears on SSN Card)

Date of Birth

Relationship

Months in Home

Wage Income

Investment Income

2

Social Security Number

Full Name (as appears on SSN Card)

Date of Birth

Relationship

Months in Home

Wage Income

Investment Income



Dependents Continued

3	<hr/> Social Security Number	<hr/> Full Name (as appears on SSN Card)	<hr/> Date of Birth
	<hr/> Relationship	<hr/> Months in Home	<hr/> Wage Income
			<hr/> Investment Income

4	<hr/> Social Security Number	<hr/> Full Name (as appears on SSN Card)	<hr/> Date of Birth
	<hr/> Relationship	<hr/> Months in Home	<hr/> Wage Income
			<hr/> Investment Income

Income Questions

At any time during the given tax year, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a **digital asset (or a financial interest in a digital asset)**?

☐ Yes ☐ No

Did you receive any wages from an employer in the given tax year? **If yes, include all Forms W-2.**

☐ Yes ☐ No

Did you receive any interest income? **If yes, include all Forms 1099-INT.**

☐ Yes ☐ No

Did you receive any income from dividends? **If yes, include all Forms 1099-DIV.**

☐ Yes ☐ No

Did you receive any income from pensions or withdraw money from a retirement plan? **If yes, include all Forms 1099-R.**

☐ Yes ☐ No

Did you withdraw any money from Health Savings Accounts (HSA)? **If yes, include all Forms 1099-SA and list the total amount used for medical expenses below.**

☐ Yes ☐ No

Amount



Income Questions Continued

Did you receive any Social Security Benefits? **If yes, include all Forms SSA-1099.**

☐ Yes

☐ No

Did you receive any income from investment sales? **If yes, include all Forms 1099-B and/or brokerage statements.**

☐ Yes

☐ No

Did you receive any unemployment compensation from the government or receive a State Income Tax refund? **If yes, include all Forms 1099-G.**

☐ Yes

☐ No

Did you receive any royalties, prizes, or awards? **If yes, include all Forms 1099-MISC and/or 1099-NEC.**

☐ Yes

☐ No

Did you receive any gambling winnings? **If yes, include all Forms W-2G.** If you'd like to claim any gambling losses, complete and include our Personal Deductions Worksheet on our website.

☐ Yes

☐ No

Did you have any cancelled debt? **If yes, include all Forms 1099-C.**

☐ Yes

☐ No

Do you have any **Schedules K-1** from Partnerships, S-Corporations, Estates, and/or Trusts? **If yes, include all.**

☐ Yes

☐ No

Did you own any rental properties? **If yes, complete and include our Rental Properties Worksheet located on our website.**

☐ Yes

☐ No

Did you pay or receive any alimony? **If yes, fill out the fields below.**

☐ Yes

☐ No

Amount

Paid or Received?

SSN of Other Party



Income Questions Continued

Did you sell your home? **If yes, include settlement statements for the purchase and sale of your home and all Forms 1098.**

☐ Yes ☐ No

Did you pay any tuition? **If yes, fill out the fields below and include all Forms 1098-T.**

☐ Yes ☐ No

Student Name	Grade/Class	Tuition Amount	Scholarship/Grant Amount
Student Name	Grade/Class	Tuition Amount	Scholarship/Grant Amount
Student Name	Grade/Class	Tuition Amount	Scholarship/Grant Amount
Student Name	Grade/Class	Tuition Amount	Scholarship/Grant Amount

Did you make any estimated tax payments to the IRS? **If yes, list amount(s) and date(s) paid, or include all Forms 1040-ES.**

☐ Yes ☐ No

Amount	Date
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Amount	Date	Amount	Date	Amount	Date
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Did you file for extension? **If yes, include Form 4868 and list the amount paid with extension.**

☐ Yes ☐ No

Amount

Did you receive any stimulus money? **If yes, include IRS Notice 1444 and/or IRS Letter 6475 and fill out the fields below.**

☐ Yes ☐ No

Amount Received by Taxpayer	Amount Received by Spouse	Amount Received by Dependents
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