



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 _____

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

Amount Date Amount Date Amount Date

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