



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

Spouse

Social Security Number

Full Name (as appears on SSN Card)

Date of Birth

Email Address

Phone Number

Occupation

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