



Note: This form must be completed and signed by the taxpayer(s). Changes made during return preparation must be noted on this form. This form must be retained in the client file.

Taxpayer's Name _____ SSN / ITIN _____

Spouse's Name _____ SSN / ITIN _____

Address _____ City _____ State _____ Zip Code _____

Phone number(s) _____ Email Address _____

<u>Individual</u>	<u>Date of Birth</u>	<u>DL# / ID# & Expiration Date</u>	<u>Occupation</u>
Taxpayer's Information:			
Spouse's Information:			

Did you or your spouse collect unemployment benefits this year?.....Yes or No

Did you or your spouse receive a stimulus payment this year?.....Yes or No

Can you or your spouse be claimed on another person's return?.....Yes or No

Do you plan to itemize Deductions this year?.....Yes or No

Are you filing a State return this year?.....Yes or No

If Yes, State _____ County _____ City _____

Did you earn any income in another State?.....Yes or No

If Yes, State _____ County _____ City _____

Can any other person(s) claim your qualifying children?.....Yes or No

Was your Home in the U.S. for more than half of the year?.....Yes or No

Do you or your spouse wish to donate \$3 to the presidential Election Fund?..... **Taxpayer:** Yes or No..... **Spouse:** Yes or No

(Checking YES will not change your tax or reduce your refund)

May the IRS discuss this return with the preparer?.....Yes or No

Dependents

<u>Name</u>	<u>Date of Birth</u>	<u>SSN / ITIN</u>	<u>Relationship</u>	<u>Status</u>	<u>Months at home.</u>
				A B C D	
				A B C D	
				A B C D	
				A B C D	
				A B C D	

***Dependent STATUS (circle one)** **A)** Dependent child who lives with you. **B)** Dependent child who lives apart due to divorce or separation. **C)** Dependent but not your child who lives with you. **D)** Nondependent child who lives with you.

Child Care Information

<u>Provider's name</u>	<u>Address</u>	<u>ID Number (SSN / EIN)</u>	<u>Amount Paid</u>

Amount paid per child: Child 1 \$ _____ Child 2 \$ _____ Child 3 \$ _____ Child 4-\$ _____



Do you have deductions for any of the following items this year? (You MUST have documentation for EACH deduction)

___ Student Loan Interest ___ Educational Expenses ___ Home Mortgage Interest
___ Traditional IRA Contributions ___ Real Estate and/or Personal Property Taxes
___ Medical Expenses ___ Charitable Contributions

Filing Status (Check One)

___ **Single** – (Unmarried, divorced, legally separated, or widowed as of the last day of the calendar year (December 31st).
___ **Married Filing Joint** – (Married on Dec 31st – includes both incomes both must sign – both responsible for payment of tax, if any).
___ **Married Filing Separate** - (Married on Dec 31st – Report own income – give name and SSN of spouse.
___ **Head of Household** – (You can file as Head of Household only if you were unmarried or considered unmarried on the last day of the year. You also have paid more than half the cost of keeping up a home that was the main home for more than half the year (except temporary absences, such as school) for you and any qualifying persons.
___ **Qualifying Widower / Widower with Dependent Child** - This status can only be used by a widow(er) who lives with a dependent child and has not remarried. It may apply for the year in which their spouse passed away, and it can be used for up to 2 years after their spouse’s death. A qualifying widow(er) must have been entitled to file a joint return with their spouse in the year that he/she passed, regardless of whether that return was actually filed.
Spouse's date of death _____

Bank Account Information

If you are electing to have your refund deposited directly into your account, please complete the following section:

Name on the Account:	
Name of Bank:	
Routing Number:	
Account Number:	
Checking or Savings Account:	

How Did you hear about our services? _____

Where did you have your taxes prepared last year? _____

How many income documents are you providing (w2's, 1099's, etc.)? _____

If you took EIC last year, was the EIC reduced or disallowed for any reason other than math or clerical error?.....Yes or No

Do you owe any IRS debts, unpaid child support, student loans, state taxes or any defaulted loans?..Yes or No

I, the undersigned, hereby certify that all of the information provided above is true and correct to the best of my knowledge. I further certify that all of the documents and information required to properly complete my tax return have been supplied to the preparer.

Taxpayer’s Signature _____ Select 5 digit PIN # _____ Date ____/____/____

Spouse’s Signature _____ Select 5 digit PIN # _____ Date ____/____/____