



# Client Intake Form

Tax Year \_\_\_\_\_

<b>Taxpayer</b>				SSN	
<i>First Name</i>	<i>M.I.</i>	<i>Last Name</i>	Email	IP PIN	
Occupation		Date of birth		Are you new to our firm? Yes No	
Address		City		State	Zip
County		Home phone		Work or cell	
Driver's License No.		State	Issue Date	Exp. Date	

<b>Spouse</b>				SSN	
<i>First Name</i>	<i>M.I.</i>	<i>Last Name</i>	Email	IP PIN	
Occupation		Date of birth		Are you new to our firm? Yes No	
Address <small>(If different from Taxpayer)</small>		City		State	Zip
County		Home phone		Work or cell	
Driver's License No.		State	Issue Date	Exp. Date	

If you moved during year, enter your previous address.	Date of move
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Marital status at 12/31.    Single    Married    Separated    Widow(er)    Registered Domestic Partnership (RDP)    Unsure  
 Were you divorced or separated during the year?    Yes    No                      Were there any deaths in the family?    Yes    No  
 Did you receive, sell, exchange, gift or otherwise dispose of a digital asset (financial currency)?    Yes    No

Names of dependent children <i>Child's full name</i>	Social Security #	IP PIN	Date of birth	Months lived in home	Relationship to taxpayer	College student?

Did any of the children have unearned income above \$1,100 for the year?    Yes    No    Do any of the children have a disability?    Yes    No  
 Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year                      Yes    No

**Other dependents or people who lived with you (or use for additional dependent children, if more space is needed than provided above)**

Name	Social Security #	IP PIN	Date of birth	Months lived in home in	Relationship	Income

Refund Direct Deposit Bank Information: *Name of bank*

Checking	Savings	Routing transit number	Account number
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**Questions — All Taxpayers**

(Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse — enter "?" if unsure about a question.

additional tax information	Yes	No	Are either you or your spouse over the age of 65, as of December 31,					
	Yes	No	Did you pay or receive alimony <i>Paid Received \$</i>		<i>Recipient's SSN</i>	<i>Date of divorce or separation</i>		
	Yes	No	Did you or anyone in your household purchase health insurance through the government market place? <b>1095A</b>					
	Yes	No	Did you have a Health Savings Account (HSA) during the year? Did you use any funds from it? Yes No					
	Yes	No	Did you itemize deductions on your taxes last year? <b>RECOMMEND TO COMPLETE FORM A Itemized Deductions</b>					
	Yes	No	Did you purchase a new energy-efficient car, truck, or van? <b>provide purchase documents</b>					
	Yes	No	Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?					
	Yes	No	Are you a member of the military?		State of residency			
	Yes	No	Are either you or your spouse legally blind?					
	Yes	No	Did you make any estimated federal or state tax payments? If yes, provide dates & amounts paid.					
	Yes	No	Any significant changes i.e. sale of your home, starting a new business, retirement or purchase of rental property? <i>List change(s):</i>					
	Yes	No	Will there be any significant changes in income or deductions next year, such as retirement?					
	Yes	No	Did you pay any interest on a loan for an RV (or boat) that has a living quarters. If yes, provide details.					
	Yes	No	Do you own any rental property, or rented out a portion of your house as a rental? <b>USE FORM B Rental Property Organizer</b>					
	Yes	No	Were any children born or adopted <i>(Provide statement for other expenses.)</i>					
income	Yes	No	Were any children attending college?	<i>Year in college</i>	Paid by you: <i>Tuition \$</i>	<i>Student loan interest \$</i>	<i>Books \$</i>	
					Paid by student: <i>Tuition \$</i>	<i>Student loan interest \$</i>	<i>Books \$</i>	
	Yes	No	Did you pay any tuition for a private school for a dependent or take classes yourself? <b>Provide 1098T</b>					
			<i>Student</i>			<i>Amount paid \$</i>		
			<i>Name and address of school</i>					
	Yes	No	Did you pay for child or dependent care so you could work or go to school? <i>(add statement if needed)</i>					
			<i>Name of provider</i>			<i>EIN or SSN</i>		
			<i>Address</i>			<i>Amount paid \$</i>		
	Yes	No	Did you make any contributions to a 529 plan					
	Yes	No	Do you have any children who have unearned income of \$1,100 or more?					
	home & other finances	Yes	No	Total number W-2 forms <i>Taxpayer Spouse</i>		Total number of 1099-R statements <i>Taxpayer Spouse</i>		
		Yes	No	Did you receive income from Social Security? <i>Social Security Statement SSA-1099 form(s)</i>				
Yes		No	Did you receive any income reported on a 1099 form? <i>1099-NEC &amp; 1099-MISC COMPLETE FORM C</i>					
Yes		No	Did you earn any interest or dividends this year? <i>1099-INT &amp; 1099-DIV forms</i>					
Yes		No	Did you sell/transfer any stock during the year? <i>1099-B form(s) or 1099 consolidated statement</i>					
Yes		No	Did you receive any unemployment? <i>1099-G form(s)</i>					
Yes		No	Did you receive income from a gig economy activity (e.g. Airbnb, Uber, etc.) or from your own business? <b>COMPLETE FORM C</b>					
Yes		No	Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture? <i>ex. K-1 forms</i>					
Yes		No	Did you, or will you contribute any money to an IRA	<i>Traditional IRA</i>	<i>Roth IRA</i>	<b>Provide 5498</b>		
Yes		No	Did you roll over any amounts from a retirement account					
Yes		No	Were you granted, or did you exercise, any employee stock options					
Yes		No	Did you sell any rental/investment property or receive any income from an installment sale?					
home & other finances	Yes	No	Did you pay sales taxes on a major purchase such as a vehicle, boat, or home?					
	Yes	No	Did you make any charitable contributions If yes, provide details.					
	Yes	No	Did you purchase or sell a main home during the year? If yes, provide closing statement.					
	Yes	No	If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details.					
	Yes	No	Did you refinance a mortgage or take a home equity loan? If yes, provide closing statement.					
	Yes	No	Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?					
	Yes	No	Did you make any new energy-efficient improvements to your home? (e.g. solar, windows, etc.) If yes, provide details.					
<b>State information</b>		Full-year resident	Part-year resident	Nonresident	If lived in another state, where?			
List dates lived in other states:				Do you rent or own your home? Rent Own				