

Basic Information

CLIENT INFORMATION

Do you want a direct deposit of your refund? ☐ Yes ☐ No	
Bank Account number:	Routing Number:

Primary Taxpayer Information:	
Marital Status	Single Married Widowed
Name: (First Last)	
Date of Birth:	
SSN# or ITIN:	
Occupation:	
Physical Address:	
City, State, Zip:	
Email address:	
Phone Number:	
County of Residence:	
Can anyone else claim you?	☐ Yes ☐ No
Active Military?	☐ Yes ☐ No

Spouse Information: (If applicable)	
Spouse Name: (First Last)	
Spouse Date of Birth:	
Spouse SSN# or ITIN:	
Spouse Occupation:	
Physical Address: (If different)	
City, State, Zip:	
Spouse Email address:	
Spouse Phone Number	
County of Residence:	
Can anyone else Claim your Spouse?	☐ Yes ☐ No
Active Military?	☐ Yes ☐ No

Dependent Information:

Name	Relationship	Date of birth	SSN# or ITIN#	F/T student?	Disabled?
				☐ Yes ☐ No	☐ Yes ☐ No
				☐ Yes ☐ No	☐ Yes ☐ No
				☐ Yes ☐ No	☐ Yes ☐ No
				☐ Yes ☐ No	☐ Yes ☐ No
				☐ Yes ☐ No	☐ Yes ☐ No
				☐ Yes ☐ No	☐ Yes ☐ No
				☐ Yes ☐ No	☐ Yes ☐ No

Tell us more about you:

Do you have Health Insurance:	☐ Yes ☐ No
Enrolled in health insurance through the marketplace?	☐ Yes ☐ No
Do you have 1095A?	☐ Yes ☐ No
Health care through employer?	☐ Yes ☐ No
Did you or your Spouse: Sell a home?	☐ Yes ☐ No
Pay/receive alimony from pre-2019	☐ Yes ☐ No

TAX FORM (Please select only what apply to you)
☐ W2 ☐ 1099R ☐ 1099INT ☐ 1099K ☐ 1099MISC ☐ 1099NEC ☐ K1 ☐ SSA ☐ 1099 ☐ DAYCARE ☐ 1098 ☐ CHARITABLE DONATIONS ☐ IRA CONTRIBUTION ☐ 1098T (EDUCATION CREDIT) ☐ W2C (GAMBLING WINNINGS) ☐ 1099B ☐ 1099DIV ☐ (INVESTMENT ACCOUNT)

FREE TAX ADVICE TO HELP MAXIMIZE DEDUCTIONS AND REDUCE TAX LIABILITY
Secure portal for access to your tax return and documents anytime

Appendix

Form name	Description	Cost
W2	Form supplied by employer	PLAN A
1099R	Retirement distributions	PLAN A
1099int	Interest from financial institutions	PLAN A
1099DIV	Dividends from brokerage/this form is often included with the 1099B	PLAN A
1099B	Stock or mutual fund sale	PLAN B
1099G	Unemployment or state tax refund	PLAN B
1098T	Education form for filing education credit/you can find this on the student portal for your school	PLAN B
1099 Misc	Royalty or other income (awards, expense reimbursement, etc.)	PLAN B
1099MISC	RENTAL PROPERTY or royalty-there are other sources less common such as contest winnings	PLAN C
1099NEC	Contractor work requires sch C self-employment form	PLAN C
1099Social sec	Social security-white & pink unless railroad	PLAN A
1099S	Sale of property issued by escrow company/copy of escrow settlement-additional information will be needed	PLAN C
1099SA	HSA distribution form	PLAN B
K1	Issued by partnership, SCorp, or trust	PLAN B
DAYCARE	REQUIRES NAME, ADDRESS, PHONE # AND FED ID NUMBER	PLAN B
SOLAR	REQUIRES COPY OF INSTALLATION RECEIPT-CERTAIN ECO ADDITIONS MAY QUALIFY	PLAN B
Energy efficient windows, doors, insulation, roof etc.		
NOTE:	Foreign tax credit may trigger an additional charge if over \$300 for single or \$600 for married filers	PLAN C
**	Each additional self-employment business (second business) is \$50 additional charge	PLAN C
***	Each additional Rental Property is \$50 additional charge (requires prior year tax return)	PLAN C
1120S	SEE BUSINESS TAXES PAGE FOR DETAILS -Starting fee-PRICE MAY VARY	\$650
1065/568	SEE BUSINESS TAXES PAGE FOR DETAILS -Starting fee-PRICE MAY VARY	\$575