

Basic Information

Taxpayer _____ Phone Number _____
Spouse _____ Phone Number _____
Address _____ City _____
County _____ Zip _____
Taxpayer SSN _____ Birthdate _____ Occupation _____
Spouse SSN _____ Birthdate _____ Occupation _____
Taxpayer Email _____ Spouse Email _____
Bank Information (for direct deposit of refund checks) Checking ____ Savings ____
Routing Number _____ Account Number _____
Taxpayer Driver's License Number _____ Expiration _____ Issued _____
Spouse Driver's License Number _____ Expiration _____ Issued _____

Completed Return

How would you like to receive your completed return? PDF ____ Hard Copy ____ Both ____

Health Insurance

Do you have Health Insurance? Yes ____ No ____
If purchased through the exchange, bring Form **1095-A** _____

Crypto

Do you have a Crypto Currency Account? Yes ____ No ____
If yes, please bring in Form 8949.

Have you been assigned a PIN by the IRS? What is your 2023 PIN _____

Dependents

| Name | Relationship | Birthdate | SSN | Months In House |
|-------|--------------|-----------|-------|-----------------|
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |

W-2 Wages - Please bring in your W-2 forms

| Employer | Box 1 | Box 2 | Box 4 | Box 6 | Box 17 | Box 19 |
|----------|-------|-------|-------|-------|--------|--------|
| _____ | _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ | _____ |

Interest and Dividend Income Amount Please bring in your Dividend 1099's

| Interest Income | Amount | Dividend Income | Total | Qualified |
|-----------------|--------|-----------------|-------|-----------|
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |

Do you have a foreign bank account? Yes _____ No _____ **Please bring in last statement**

Mutual Fund Dividends - Please bring in your 1099's

| Payer | Dividends | Qualified Dividends | Capital Gain |
|-------|-----------|---------------------|--------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

Other Income

2022 State Refund Received in 2023 _____
 Unemployment Income _____
 Partnership Income- Attach K-1 _____
 Prizes, Awards, Lottery _____
 Royalties _____

| | Payer | Amount | Fed W/H | State W/H |
|----------------|-------|--------|---------|-----------|
| Pension Income | _____ | _____ | _____ | _____ |
| | _____ | _____ | _____ | _____ |
| | _____ | _____ | _____ | _____ |
| | _____ | _____ | _____ | _____ |
| | _____ | _____ | _____ | _____ |

Social Security Income- Taxpayer _____ Spouse _____

Medical Expenses (These expenses must exceed 7.5% of your Gross Income)

1. Hospitalization Insurance Premiums _____
2. Prescription _____
3. Transportation, Miles for Medical _____
4. Medical Equipment, Eye Glasses, etc. _____
5. Doctors, Dentists, and Hospital payments _____
6. Long Term Care Insurance _____ # of Policies _____
7. HSA Contributions-Please bring Form 1099-SA _____

Taxes Paid

1. Real Estate Taxes on Home _____
2. State Income Tax Withheld _____
3. Ownership Tax on Cars _____
4. Sales Tax paid on Auto Purchase _____

Interest Paid- Please bring in Form 1098

| | Bank Name | Amount |
|--|-------------------------|--------|
| 1. Home Mortgage Interest 1 st Mortgage _____ | _____ | _____ |
| Additional Loan Information: | Purchase Price of House | _____ |
| | Original Loan Amount | _____ |
| | Current Loan Amount | _____ |
| 2. 2 nd Mortgage Interest _____ | _____ | _____ |
| What were these funds used for? _____ | | |
| 3. Did you refinance this year? If yes, what is the length of new loan _____ | | |
| If yes, please bring a copy of the closing disclosure! | | |

Other

1. Alimony/Maintenance _____
 List recipients SSN _____ Date of Divorce _____

2. Solar Energy Expenses - New windows, insulation etc. _____

3. Child Care Expenses:

| Paid To | Federal ID/SSN | Address | Amount | Phone |
|---------|----------------|---------|--------|-------|
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |

Sales of Stock or Property

| Description | Date Acquired | Date Sold | Sale Price | Cost |
|-------------|---------------|-----------|------------|-------|
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |

Retirement

| | | |
|----------------------|--|--|
| Payment to IRA | | |
| Payments to SEP | | |
| Payments to Roth IRA | | |

College Education Expenses-Please Bring Form 1098-T

| Student Name | Year in College | School Name | Tuition Expense |
|--------------|-----------------|-------------|-----------------|
| | | | |
| | | | |
| | | | |

Education Related Interest _____

Payments to 529 Plans _____

Did you pay quarterly estimates in 2023?

| | Federal | State |
|---------|---------|-------|
| 4/18/23 | | |
| 6/15/23 | | |
| 9/15/23 | | |
| 1/15/24 | | |

Rental Income & Expenses- (List each property separately)

| | |
|--------------------------------------|----------------------|
| Property Address _____ | Date Purchased _____ |
| Total Rents Received-2023 _____ | Purchase Price _____ |
| # of Days Rented _____ | Date Rented _____ |
| Hours spent on Rental activity _____ | |
| Expenses: | |
| Advertising _____ | Legal _____ |
| Auto & Travel _____ | Repairs _____ |
| HOA _____ | Supplies _____ |
| Commissions _____ | Taxes _____ |
| Insurance _____ | Utilities _____ |
| Interest _____ | Misc. _____ |

Appliances/Major Improvements/Etc.

| Description | Amount | Date Purchased |
|-------------|--------|----------------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |

Small Business Income & Expenses

If you use a portion of your home for business use, please provide:

Square footage of office _____ Square footage of home _____

Home Insurance _____ Home Utilities _____ Home Repairs _____

Business Income _____ **Bring in Forms 1099-K**

Expenses

| | |
|--------------------------|------------------------------|
| Advertising _____ | Office Supplies _____ |
| Bank Charges _____ | Professional Fees _____ |
| Car Expenses/Miles _____ | Rent _____ |
| Commissions _____ | Repairs _____ |
| Dues _____ | Supplies _____ |
| Freight _____ | Taxes _____ |
| Insurance _____ | Utilities _____ |
| Interest _____ | Misc. _____ |
| Cell Phone _____ | Travel & Entertainment _____ |

Major Purchases (Description) _____

| | Car 1 | | Car 2 | |
|---|-------|----|-------|----|
| 1. Auto expenses: Gas, Ins., Repairs, Lease | _____ | | _____ | |
| 2. Total Miles Driven – 2023 | _____ | | _____ | |
| 3. Business Miles | _____ | | _____ | |
| 4. Do you have written evidence to support car mileage? | Yes | No | Yes | No |

