



**PERSONAL TAX  
INFORMATION FOR  
TAX YEAR 2022**

<b>For Office Use</b> <b>Date Received</b>  <b>Received By:</b>
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- Did we do your 2021 return **YES or NO**
  - (If not please include a copy of your 2021 return & copies of SS cards & DL)
- Have we done your taxes in the last 4 years **YES or NO**
- Do you also have an appointment:** If yes, when: \_\_\_\_\_

**Client Information:**

Primary Taxpayer Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Social Security # or ITIN: \_\_\_\_\_

IRS ID PIN (6 digits) \_\_\_\_\_

Occupation: \_\_\_\_\_

Marital Status: **Single Married Widowed**

Best Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_

Preferred Contact Method: **Email Call Text**

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Spouse Name: \_\_\_\_\_

Spouse Date of Birth: \_\_\_\_\_

Spouse Social Security # or ITIN: \_\_\_\_\_

Spouse IRS ID PIN (6 digits) \_\_\_\_\_

Spouse Occupation: \_\_\_\_\_

Address (if different): \_\_\_\_\_

Best Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_

County you live in: \_\_\_\_\_

School District: \_\_\_\_\_

Did <u>sell or trade or exchange</u> , any <b>Virtual Currency</b> in 2022? If yes, we need your transactional list.
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**Dependents\*** (or person living in your household – Earned Income Credit, only claimed if you housed child over ½ year)

Name	Social Security # or ITIN		Claiming as Dependent?	Claiming for EIC	Full Time Student?	Disabled?
Date of Birth	Relationship	Months Lived w/ You	YES NO	YES NO	YES NO	YES NO

- ❖ Can you be claimed as a dependent by someone else? **YES NO**
- ❖ Are You an active member or the spouse/ dependent of an active member of the military? **YES NO**

Taxpayer ID Type: <b>Driver's License or State ID</b>	State or Place Issued:	Taxpayer ID Type: <b>Driver's License or State ID</b>	State or Place Issued:
ID #:		ID #:	
Date Issued:	Date Exp:	Date Issued:	Date Exp:

# Document Checklist

**Did you have marketplace insurance? Yes No If Yes, we NEED the 1095-A form**

**Income:** Check all that apply and include requested documents, if available

<b>Income From:</b>	<b>Yes</b> <input checked="" type="checkbox"/>		<b>Yes</b> <input checked="" type="checkbox"/>
Employer (W-2)		Self-Employment	
Interest (1099-Int)		Social Security/Retirement	
Dividends (1099-Div)		Rental Property*	
Stock or Mutual Fund sale (1099-B)		Unemployment (1099-G)	

**Expenses:** Check all that apply and include requested documents, if available

<b>Expenses From:</b>	<b>Yes</b> <input checked="" type="checkbox"/>		<b>Yes</b> <input checked="" type="checkbox"/>
Self-Employment		Un-reimbursed by your employer	
Education		Rental Property	
Medical/Dental care		Union Dues	

**Credits and Deductions:** Check all that apply and include requested documents, if available

<b>Did you or your spouse:</b>	<b>Yes</b> <input checked="" type="checkbox"/>		<b>Yes</b> <input checked="" type="checkbox"/>
Donate cash or goods to a charity?		Charitable Miles? (number)	
Pay Child/Dependent Care expense? Need SS# or EIN for caregiver		Health Ins premiums out of pocket (Not thru paycheck) Or Medicare Supplement	
Have Medical Expenses exceeding 7.5% of your adjusted gross income?		Medical Miles? (number)	
Make an IRA Contribution?		Make an HSA contribution?	
Pay Student Loan interest? (1095-T)		Make a major taxable purchase?	
Pay Property Taxes? (Total in pd. in 2022)		Have a Mortgage Payment? (1098)	
Pay Rent (\$ per month & # of months)		Was heat included with rent?	

**Miscellaneous\*:** Check all that apply

<b>Did you or your spouse:</b>	<b>Yes</b> <input checked="" type="checkbox"/>		<b>Yes</b> <input checked="" type="checkbox"/>
Sell a home?		Take an IRA or 401(k) distribution?	
Pay/Receive alimony?		Adopt a child?	
Suffer catastrophic loss?		Have gambling winnings/losses?	

**ESTIMATED TAXES PAID – Payments you sent in DO NOT include amounts from your paychecks**

	1 <sup>st</sup> Quarter	2 <sup>nd</sup> Quarter	3 <sup>rd</sup> Quarter	4 <sup>th</sup> Quarter
Date				
Federal				
State				

**DIRECT DEPOSIT INFORMATION – It is your responsibility to make sure this is correct**

Bank Name	Checking or Savings	Routing Number	Account Number

\_\_\_\_\_ I would rather my refund be mailed even though it may take longer to receive