New Client Form Please read carefully, fill out all fields that apply, and sign the bottom of page 2.

Let us know if you need any help filling this out.

Social Security #	
Name	
Birthdate	
Occupation	
Cell Phone	
Other Phone	
Email	
Address (include City, ST, zip please)	

Spouse Name	
Social Security #	
Birthdate	
Occupation	
Cell Phone	
Other Phone	
Email	

☐ Single;

☐ Married filing Joint

☐ Married but filing Separate Give spouse Name/SSN/birthdate above

☐ Lived separate from spouse for last 6 months of year or more

☐ Divorced during the tax year

☐ Head of Household (unmarried with dependent(s) in the house)

☐ Widowed during the tax year. Date: ___________

☐ I have ____ children that I claim on my return and will fill out **Dependent Form** for each child. New this year we have a detailed form for you to get every credit and deduction possible for your dependents and to protect you - and us - from the new penalties.

☐ How did you find us? ___________________________________ ☐ Referred by: __________________________________

☐ Had health insurance the whole year. ☐ Bought it on the ACA marketplace/exchange – If so, we need form 1095-A

☐ Did not have health insurance for these months: ____

☐ Spent $ _________this year on higher education - for ☐Me, ☐My Spouse, (If for a dependent include it on the Dependent Form). It was for: ☐ Undergraduate, ☐ Graduate, ☐ I included the 1098-T with my documents (required).

☐ Moved: Date: ___/___/___ from (city, State): _________ to (city, ST): __________. Spent $______ on moving/storage & $_____ on travel/lodging. ☐Moved 50 miles closer to work; ☐Changed workplace/base; ☐Temporary Assignment

☐ I have a traditional IRA, and/or ☐Roth – outside of work

Made ☐Traditional IRA, or ☐Roth contributions. ☐For myself $_________, ☐Spouse $_________

☐ I have an HSA, ☐I have a high deductible health insurance plan

☐ I have an old 401k from a previous job and would like to know the benefits of rolling it over into an IRA.

☐ I have over $10,000 in a foreign bank account. If so, ask us for the FBAR worksheet (or download it from our website).

☐ Bought a car/boat, RV, large purchase. The sales tax was $_________;

☐ Spent $_________ to get my tax return prepared last year. (That amount is deductible this year if itemizing).

☐ Donated money to charity: total amount: $__________, ☐I pay $_______ each year for my safe deposit box,

☐ Donated items to charity: estimated value: $___________, If over $500 worth of items donated we'll need to know: Which Charity? _____________________, What kind of items? ☐Clothing, ☐Furniture, ☐Household items, ☐other: ____ .

☐ Spent $__________ out of pocket on medical - Include long term care premiums paid after tax (not pre-tax).

☐ Health insurance premiums I paid out of pocket (not paid by my employer) $ _________.

☐ Drove __________ miles doing volunteer work for a 501c3 charity. ☐ Drove __________ miles for doctor visits.

☐ Sent in quarterly Estimated Taxes: Dates & amounts: ____

Last year ☐ I received a refund from IRS: approximately $__________; ☐ I received a refund from state(s): $_________;

☐ I owed money to the IRS: $_________. ☐ I'm on an installment plan with the IRS;

☐ Owed money to state: (which state(s) _________)amount $_________. ☐ I'm on a state installment plan.

☐ Deposit my refund (if I receive one) directly into my bank account. (attach void check)

Bank Name ________________________, Routing # (9 digits) ___________________, Account# ________________.

Remember to send/bring these items (if they apply to you):

- Last Paystub from each job employed,
- Last year's Federal & State returns,
- W-2(s) from your employer(s),
- 1099-MISC forms for self-employment income,
- 1099-INT (interest) and 1099-DIV (dividends),
- 1098 Mortgage Interest Statement,
- Property Tax bill (if not escrowed in mortgage),
- 1098-E Student Loan Interest Statement
- 1098-T College or Graduate School Statement
- 1099-SSA form showing Social Security received,
- 1099-B forms for brokerage trades: stocks/bonds,
- K-1 forms from partnership, Corp., or trust,
- 1095-A for health insurance bought on exchange
- 1099 SSA if you have HSA Health Savings Account
- Bought a new house: HUD statement (3 pages)

Did anything else happen this year that might influence your taxes?
These might include – received or paid alimony, carrying capital losses from last year, etc.:

____

____

☐ I would like to receive a printed copy of my tax return and supporting documents.
☐ I would like to receive a digital copy of my tax return and supporting documents via encrypted email.
☐ I would like my tax return and supporting documents uploaded to your secure portal.
☐ I would like to receive a printed copy of my tax return and supporting documents by snail-mail for $10 extra

I will keep my copy of my tax return in a safe place and understand a fee of $10 will be charged for a duplicate copy. NO PIN #'s will be given out without the paid fee.

Please read and sign below: I am paying for the time and expertise of a professional tax preparer. I understand that I will be charged for the preparation of this return before I am told the amount of my refund or liability to the IRS.

I understand that my return will be prepared based on the information I provide, my documents will be available to me in the format I have checked above. I am solely responsible for the accuracy of the data that I provide.

Signature: ____________________________________ **(REQUIRED)**

Lemmon Notary & Tax Services 16128 Rt 119 Hwy N Rochester Mills, Pa 15771
Office: 724-286-9771 Fax: 724-286-9779
lemmonnotary@gmail.com