

**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.

<b>Name</b>	
<b>Social Security #</b>	
<b>Birthdate</b>	
<b>Occupation</b>	
<b>Cell Phone</b>	
<b>Other Phone</b>	
<b>Email</b>	
<b>Address (include City, ST, zip please)</b>	
<b>Driver's License #</b>	
<b>Issued Date</b>	
<b>Expiration Date</b>	

<b>Spouse's Name</b>	
<b>Social Security #</b>	
<b>Birthdate</b>	
<b>Occupation</b>	
<b>Cell Phone</b>	
<b>Other Phone</b>	
<b>Email</b>	
<b>Address (include City, ST, zip please)</b>	
<b>Driver's License #</b>	
<b>Issued Date</b>	
<b>Expiration Date</b>	

Single                                      Lived separate from spouse for Last 6 months of year or more                                      Head of Household (unmarried with dependent(s) in the house)

Married, filing jointly                      Divorced during the tax year                                      Widowed during the tax year  
Date: \_\_\_\_\_

Married but filing Separate (Give Spouse's name/SSN/Birthdate)

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

Bank Name: \_\_\_\_\_ Routing# (9 digits) \_\_\_\_\_ Account # \_\_\_\_\_

I have \_\_\_\_\_ child(ren) that I claim on my return. Provide SS Card & Birth Certificate for each child claiming.  
How did you find us? \_\_\_\_\_ Referred by: \_\_\_\_\_

Health Insurance: Purchased on the ACA Market Place/Exchange if so, we need form 1095-A

Spent \$ this year on higher education for Me, My Spouse, Dependent(s)  
It was for Undergraduate, Graduate, I included the 1098-T with my documents (required)

Moved: Date \_\_\_\_\_ to (City, State) \_\_\_\_\_ (Attach copies of moving/storage & travel/lodging totals). Moved 50 miles closer to work; Changed workplace/base Temporary Assignment

Made Traditional IRA or Roth Contributions. For myself \$ \_\_\_\_\_, Spouse \$ \_\_\_\_\_

I have an HSA outside of work (attach deposits & withdrawals)

Spent \$ \_\_\_\_\_ to get my return prepared last year.

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, (attach totals)

Spent money out of pocket on medical – include long term care premiums paid after tax (not pretax & attach totals)

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.

**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 NEC forms for self-employment income
- 1099 INT (interest) and 1099 DIV (dividends)
- 1099 G unemployment compensation
- 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 form from brokerage trades: stocks/bonds
- K-1 forms from Partnership, Corp., or Trust
- 1095-A for health insurance bought on exchange
- 1099-SA if you have HSA (Health Savings Account)
- Bought a new house: HUD statement (3 pages)
- Sent in quarterly Estimated Taxes: Dates & amounts: attach copies of dates & amounts

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.

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I would like to receive:

- a printed copy of my tax return
- a digital copy of my tax return via encrypted email.
- a digital copy of my tax return on a thumb drive provided by me.
- a printed copy of my tax return by snail-mail for \$10 or cost.
- I do not want a copy of my tax return in any format above. (Keep in File)

**I am solely responsible for the accuracy of the data that I provide. I understand that my return will be prepared based on the information I provide; and I will be charged an additional fee if changes have to be made to my return. I understand all forms must be signed before my tax returns are e-filed. I will keep my copy of my tax return in a safe place and understand a fee of \$10.00 (includes tracking) will be charged for a duplicate copy. NO PIN#'s or AGI's will be given out without the paid fee.**

**Do not send any attachments via email, they will not be opened.**

**All forms must be uploaded to the Secure Portal and must be in PDF format only.**

**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 provided; 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)**

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