Taxpayer Name:________________________ **Cell Phone:** ___________________ **Email:**_________________________________

☐ Copy of taxpayer's (and taxpayer spouse) Driver's License (or other govt issued ID).

CLIENT INFORMATION (This Page is REQUIRED)

****If we did not prepare your 2021 tax return, please include a copy of the return and complete all items below****

☐ NO CHANGES – Name, Filing Status, and Dependent information is the same as it appears on my 2021 return.

Taxpayer Name: _______________________________ SSN: _____-_____-________ Date of Birth: ____/_____/__________

Spouse Name: ________________________________ SSN: _____-_____-________ Date of Birth: ____/_____/__________

Mailing Address: ____________________________________ City: ____________________ State: _____ Zip Code: _________

Taxpayer Phone:____________________________________ Taxpayer Email: ______________________________________

Spouse Phone: ______________________________________ Spouse Email: ____

Filing Status (circle one): Single Married Joint Married Separate Head of Household

Dependent Name	SSN	Birth Date	Relationship	Legal Custody
_________________________________	______________	___/___/_______	__________	Yes No
_________________________________	______________	___/___/_______	__________	Yes No
_________________________________	______________	___/___/_______	__________	Yes No

Bank Information for Refund or Payment

☐ NO CHANGES – All bank information is the same as it appears on my 2021 return.

Bank Name: _________________________________ Type of Account: ☐ Checking ☐ Savings

Routing Number: _____________________________ Account Number: ______________________________

Your Return CANNOT Be Completed if these Questions Are Not Answered

Yes No - Did you/your spouse have any transactions (receive, sell, exchange, etc) in any virtual currencies (i.e. Bitcoin, etc)?

Yes No - Do you/your spouse have signing authority on a foreign bank account, or did you have any transactions to or from a foreign trust?

CLIENT CHECKLIST – TAX YEAR 2022 (This Page is OPTIONAL)

Please gather the following tax information, if applicable, and bring with your completed CLIENT INFORMATION worksheet. We ask that you bring all of your documents at one time.

☐ If you paid estimated tax payments, please list below:

Pymt 1: due 04/15/2022 – Date Paid: ____________________ Amount Paid: ____________________

Pymt 2: due 06/15/2022 – Date Paid: ____________________ Amount Paid: ____________________

Pymt 3: due 09/15/2022 – Date Paid: ____________________ Amount Paid: ____________________

Pymt 4: due 01/15/2023 – Date Paid: ____________________ Amount Paid: ____________________

Income documents:

☐ All W-2 forms for wages, salaries, and tips.

☐ All 1099-R forms for distributions received from retirement plans, pensions, annuities, IRA accounts, etc.

☐ All 1099 forms for interest, dividends, stock sales, miscellaneous income, unemployment, etc. We need <u>ALL PAGES</u> of the brokerage statements showing all investment transaction.

☐ All K-1 schedules showing income from partnerships, S-Corporations, estates, and trusts.

☐ All HUD-1/Settlement Statements if you PURCHASED, SOLD, or REFINANCED real estate during 2022.

If you itemize deductions, we also need:

☐ Total amount of property taxes paid.

☐ All 1098 Mtg Int forms for Mortgage Interest Paid.

☐ Total medical expenses paid and number of miles driven to seek medical care.

☐ Sales tax paid on major purchases (motor vehicles, aircraft.boat, major renovations/improvements)

If you have a small business or rental property, we have a worksheet that can help you gather and organize the income and expenses for those activities. Please call the office to request those.