



## Personal Tax Intake Worksheet

Name: \_\_\_\_\_ SSN: \_\_\_\_\_ DOB: \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Occupation: \_\_\_\_\_ Filing Status: \_\_\_\_\_ Copy of Driver's License

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

**Spouse Name:** \_\_\_\_\_ SSN: \_\_\_\_\_ DOB: \_\_\_\_\_

Occupation: \_\_\_\_\_ Copy of Driver's License

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

**Would you like us to conduct an analysis of your return for future tax savings recommendations?**  Yes  No

Did you have any virtual currency that was received, sold, sent, exchanged, or acquired?  Yes  No

How would you like to receive a copy of your tax return?  Printed Copy  Digital Copy

If you receive a tax refund, how would you like to have your refund payment processed?  Direct Deposit  Mail

If choosing direct deposit: Routing Number: \_\_\_\_\_ Account Number: \_\_\_\_\_

Dependent Name	SSN	DOB	Relationship	Months in Home

*If we did not prepare your tax return from the previous year, please provide a copy along with your other tax documents.*

### Income / Credits:

Standard Employment (W-2)

Tip Income

Overtime Income

Interest / Dividend Income (1099-INT / 1099-DIV)

Pension / Retirement (1099-R)

Social Security (SSA-1099)

Sales of Stocks or Bonds (1099-B)

Self-Employed (1099-Misc, 1099-K, 1099-NEC)

Partnership Investment (K-1)

Unemployment (1099-G)

Cancelled Debt (1099-C)

Gambling Winnings/Loses (W-2G)

Vehicle Loan Interest

Charity Donations

HSA Contributions (5498-SA)

Out-of-Pocket Medical Expenses

Student Loan Interest (1098-E)

State Refund (1099-G)

HSA Distributions (1099-SA)

Qualified Education Program (1099-Q)

Received Alimony

Rental Income Expenses

Energy Credit

Sold Home (1099-S)

AZ Tax Credits

Child Care Expenses

Retirement Contributions

Estimated Taxes Paid: \$ \_\_\_\_\_

Tuition Statement (1098-T)

### Expenses / Deductions:

Marketplace Insurance (1095-A)

Property Tax / Mortgage Interest (1098)

Personal Property Taxes (sales tax, vehicle tax, etc)



## Notes: