



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:
