



Are you a new client or returning client to Meridian Tax & Accounting?

New Client

Returning Client

How did you learn about us?

If you were referred by another client, we would love to credit their account with a referral discount as our way of saying thank you! *

Do you have a copy of your last filed tax return that you can provide to us?

YES

NO

If you itemized on your last filed return, what was your state refund or balance due amount?

Please call our office to provide us with your FULL SSN. We canNOT start your return until we have this information.

816-987-2393

Taxpayer Date of Birth *

Month Day Year

Was the Taxpayer Issued an Identity Protection Pin (IP PIN) by the IRS? *

YES

NO

Are you married? *

YES

NO

Spouse Date of Birth

Month Day Year

Was the Spouse Issued an Identity Protection Pin (IP PIN) by the IRS?

YES

NO

Can someone else claim YOU or YOUR SPOUSE as a dependent on THEIR tax return? *

YES

NO

Did you LIVE or WORK in the city limits of KCMO anytime during the year? *

YES

NO

If you do not live in the city limits of KCMO, but worked in the city limits of KCMO did you also work from home anytime during the year?

YES

NO

How many days did you work OUTSIDE the city limits of KCMO during the year?

Did your spouse LIVE or WORK in the city limits of KCMO anytime during the year?

YES

NO

If your spouse does not live in the city limits of KCMO, but worked in the city limits of KCMO did your spouse also work from home anytime during the year?

YES

NO

How many days did your spouse work OUTSIDE the city limits of KCMO during the year?

Did ANYONE in your household have health insurance through the MARKETPLACE? *

YES

NO

Did ANYONE in your household participate with digital currency? *

NO

Do you have any dependents to claim this year *

YES

NO

Do you need to ADD any dependents to your return this year?

YES

NO

Have more than 3 dependents? Please provide their information below.

Do you need to REMOVE any dependents from your return this year?

YES

NO

Name(s) of dependents to remove.