



Personal Tax Client Intake Form

All information provided is confidential and used solely for the preparation of your tax return.

Our Tax Preparation Process

We make tax preparation simple, secure, and convenient for clients both locally and nationwide. Most clients complete the entire process remotely through our secure online system — no office visit is required. All personal and tax information is collected only through our encrypted client portal to protect your privacy.

Below is what to expect when working with us.

Step 1 – Review What’s Required

View this Client Intake Preview Form to see what information and documents will be needed. This preview is for informational purposes only — no sensitive data is collected on public forms.

Step 2 – Request Service or Contact Us

When you are ready to move forward, you may submit a service request or contact us by phone or through our website. If a consultation or appointment is appropriate for your situation, scheduling options and any applicable fees will be explained at that time.

Step 3 – Secure Client Portal

Once accepted as a client, you will receive access to a secure, encrypted client portal where all personal and tax information is safely uploaded and stored.

Step 4 – Complete Intake

You will provide your tax information and documents inside the “secure portal”. Our team will review everything and follow up if anything is missing or needs clarification.

Step 5 – Tax Preparation

Your tax return is prepared based on the information you provide.

Step 6 – Review & Approval

After your return is prepared, you will be notified that it is ready for review. A summary of your results will be provided, and preparation fees will be confirmed before the completed return is released for final approval and filing.

Step 7 – E-File & Confirmation

Once approved, your return is electronically filed, and you will receive confirmation.

Your Privacy Matters

We follow IRS and federal data-security standards to protect your information.

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SECTION 1 – Taxpayer Information

Full Legal Name: _____

Social Security Number: _____

Date of Birth: _____

Phone Number: _____

Email Address: _____

Mailing Address:

Street _____

City _____ State _____ Zip _____

Marital Status (as of Dec 31):

Single Married Filing Joint Married Filing Separate Head of Household Qualifying Widow(er)

Occupation: _____

Did you live in this state all year? Yes No (list other states): _____

SECTION 2 – Spouse Information (if applicable)

Full Legal Name: _____

Social Security Number: _____

Date of Birth: _____

Phone Number: _____

Email Address: _____

Occupation: _____

SECTION 3 – Dependents

List everyone you “supported” during the year.

Name SSN Date of Birth Relationship Months Lived with You

SECTION 4 – Income Sources (check all that apply)

- W-2 (Job)
- Self-Employment / 1099-NEC
- Unemployment
- Social Security
- Pension / Annuity
- Interest (1099-INT)
- Dividends (1099-DIV)
- Stock / Crypto Sales (1099-B)
- Rental Income
- Gambling / Lottery
- Alimony
- Other: _____

SECTION 5 – Tax Documents You Must Provide

Please provide copies of all that apply:

Income

- W-2
- 1099-NEC / 1099-MISC
- 1099-INT
- 1099-DIV
- 1099-B (stocks/crypto)
- SSA-1099
- 1099-G (unemployment)

Deductions & Credits

- Mortgage interest (1098)
- Property tax
- Student loan interest (1098-E)
- Tuition (1098-T)
- Childcare expenses
- Medical expenses
- Charitable donations
- IRA / Retirement contributions
- Health Insurance (1095-A, B, or C)

SECTION 6 – Self-Employed / Business (if applicable)

Business Name: _____

Business Type: _____

- Income summary
 Expense summary
 Vehicle mileage
 Home office expenses
 Business licenses / EIN

SECTION 7 – Banking Information (for Refund or Payment)

Bank Name: _____

Routing Number: _____

Account Number: _____

- Checking Savings

SECTION 8 – Prior Year Information

- Last year's tax return provided
 First time filing with this preparer

SECTION 9 – IRS Authorization

Do you authorize this tax preparer to e-file your return?

- Yes No

Do you authorize them to speak to the IRS on your behalf if needed?

- Yes No

SECTION 10 – Client Certification & Portal Consent

I certify that the information I have provided is true and complete to the best of my knowledge. I understand that submission of this form does not establish a client relationship. I acknowledge that tax preparation fees will be discussed and confirmed before my completed tax return is released or filed. I also consent to receive and submitting documents through the secure client portal.

Client Signature: _____

Date: _____