

SELECT: ☐ PORTAL *E-mail address ☐ PAPER FILING *Additional fee ☐ E-FILE **TAX RETURN #** _____

SCREEN 1-GENERAL	<p><u>CLIENT INFORMATION</u></p> <p>Name _____ Date In _____</p> <p>Address _____ Info Taken By: _____</p> <p>City/ State/Zip _____ *E-mail _____</p> <p>Primary Phone: <input type="checkbox"/> Cell _____ <input type="checkbox"/> Home _____ <input type="checkbox"/> Work _____</p> <p><u>PHOTO ID</u> <input type="checkbox"/> Photocopy or Number _____ Date Issued _____ Exp. _____</p> <table style="width: 100%;"> <tr> <td style="width: 33%;"><u>FILING STATUS</u></td> <td style="width: 33%;"><u>TAXPAYER</u></td> <td style="width: 33%;"><u>SPOUSE</u></td> </tr> <tr> <td><input type="checkbox"/> Single</td> <td>SSN _____</td> <td>SSN _____</td> </tr> <tr> <td><input type="checkbox"/> Married-Joint</td> <td>DOB _____</td> <td>DOB _____</td> </tr> <tr> <td><input type="checkbox"/> Married-Separated</td> <td>DOD _____</td> <td>DOD _____</td> </tr> <tr> <td><input type="checkbox"/> Head of Household</td> <td>IP PIN# _____</td> <td>IP PIN# _____</td> </tr> <tr> <td><input type="checkbox"/> Dependent on Parents Taxes</td> <td colspan="2"><u>IDENTITY THEFT</u> <input type="checkbox"/> No <input type="checkbox"/> Yes-Provide IP Pin#</td> </tr> <tr> <td colspan="3"><input type="checkbox"/> Property Tax Credit: Social Security SSA-1099 _____ Real Estate Tax Receipt _____</td> </tr> <tr> <td colspan="3">Receipt or letter from landlord stating amount of rent paid _____</td> </tr> <tr> <td colspan="3">Received, sold, sent, exchanged or acquired virtual currency? YES _____ NO _____</td> </tr> </table>	<u>FILING STATUS</u>	<u>TAXPAYER</u>	<u>SPOUSE</u>	<input type="checkbox"/> Single	SSN _____	SSN _____	<input type="checkbox"/> Married-Joint	DOB _____	DOB _____	<input type="checkbox"/> Married-Separated	DOD _____	DOD _____	<input type="checkbox"/> Head of Household	IP PIN# _____	IP PIN# _____	<input type="checkbox"/> Dependent on Parents Taxes	<u>IDENTITY THEFT</u> <input type="checkbox"/> No <input type="checkbox"/> Yes-Provide IP Pin#		<input type="checkbox"/> Property Tax Credit: Social Security SSA-1099 _____ Real Estate Tax Receipt _____			Receipt or letter from landlord stating amount of rent paid _____			Received, sold, sent, exchanged or acquired virtual currency? YES _____ NO _____		
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DIRECT DEPOSIT	<p><u>FILING OPTIONS & DIRECT DEPOSIT</u></p> <p>GAVE VOIDED CHECK <input type="checkbox"/></p> <p>NAME OF BANK _____</p> <p>ROUTING # SAVINGS <input type="checkbox"/> CHECKING <input type="checkbox"/> _____</p> <p>SAVINGS / CHECKING ACCOUNT # _____</p>																											
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SCREEN 3-INCOME	<table border="0" style="width: 100%;"><tr><td style="vertical-align: top;">INCOME CHECKLIST _____ W-2 _____ 1099R _____ 1099-SSA _____ 1099-MISC _____ 1099-NEC _____ 1099-INT _____ 1099-DIV</td><td style="vertical-align: top;">_____ UNEMPLOYMENT _____ _____ 1099-K _____ 1099-B _____ 1099-C SCHEDULE C PAID _____ RENTAL GAMBLING: FARM WIN _____ LOSS _____</td><td style="vertical-align: top;">STUDENT LOAN INT _____ HSA/MEDICAL SAVINGS REG _____ ROTH _____ (529) EDUCATIONAL _____ RECEIVED _____ PAID _____ GAMBLING: _____ WIN _____ LOSS _____</td><td style="vertical-align: top;">IRA CONTRIBUTIONS: </td></tr></table>	INCOME CHECKLIST _____ W-2 _____ 1099R _____ 1099-SSA _____ 1099-MISC _____ 1099-NEC _____ 1099-INT _____ 1099-DIV	_____ UNEMPLOYMENT _____ _____ 1099-K _____ 1099-B _____ 1099-C SCHEDULE C PAID _____ RENTAL GAMBLING: FARM WIN _____ LOSS _____	STUDENT LOAN INT _____ HSA/MEDICAL SAVINGS REG _____ ROTH _____ (529) EDUCATIONAL _____ RECEIVED _____ PAID _____ GAMBLING: _____ WIN _____ LOSS _____	IRA CONTRIBUTIONS: 																													
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