

Please complete and return this form along with your tax documents

Referred by _____ Are you prior customer? YES () NO ()

First Name _____ Middle Initial _____ D/B ____/____/____

Last Name _____ Occupation _____

Social security/ITIN Number: _____

Spouse First Name: _____ Middle Initial _____ D/B ____/____/____

Last Name: _____ Occupation _____

Spouse social security /ITIN number: _____

Current Address: _____

Phone: Cell: _____ (H) _____

E-mail: _____

Have you received Stimulus payment? () () If yes then how much? 1st. _____
Yes NO 2ND. _____

Dependents: First Name, Middle Initial & Last Name, Date of Birth, SSN/ITIN & Relationship

1. First _____ MI _____ Last _____ D/B _____

SS# _____ Relationship _____

2. First _____ MI _____ Last _____ D/B _____

SS# _____ Relationship _____

3. First _____ MI _____ Last _____ D/B _____

SS# _____ Relationship _____

Did You receive Health Insurance through Market place YES () NO ()

If answer YES then please send 1095-A with other documents

Do you need direct deposit/ Direct Debit? YES () NO ()

Bank Routing #: _____

Account Number: _____

Name of Bank: _____ () Savings () Checking

Write if you have anything to discuss: _____

General Information

Names, Social security number (or ITIN) and date of birth of you and your dependent must submit exactly on the documents.

Child care provider Name, Address and Tax ID number or Social security Number is required to claim credit for dependent care expenses.

INCOME

- Current W-2 forms
- Interest or Dividends received (From 1098-Int, 1098-Div)
- State and Local refunds (1099-G)
- Business Income/Loss (1099-Misc, Sch C, 1099-NEC)
- Capital Gain/Loss (Stock trading, Foreign exchanges – Crypto, Bitcoin etc.)
- Partnership, S-corporation & trust income (From K-1)
- Pension and Annuities (401K withdrawal) (Form 1099-R)
- Social security Benefits (From 1099-SSA, RRB-1099)
- Unemployment Compensation received (Form 1099-G)
- Alimony received
- Other Income – Gambling and lottery winning (From W-2G, 2555)

EXPENSES

- Mortgage interest statement (form 1098S)
- Real estate tax paid (Mostly on the mortgage statement)
- Gift to charity (Cash, check or any other type of donation – Cloths, vehicle, toys etc.)
- Medical and Dental expenses (Expenses only if more than 7.5% of your total income)
- Child care expenses
- Settlement papers if you purchased, sold or refinanced homes.
- Education tax credit (Need to get 1098-T from the institution)
- IRA contribution, if you made any.
- Purchase documents if you bought qualified electric vehicle or solar electric credit. (8936, 5695)