

To better serve you and meet your tax preparation expectations, we ask that you take a few minutes to fill out the information below. If you have any questions while completing this form, please do not hesitate to ask.

1

Fill out this form to the best of your knowledge, and review and sign.

2

You can choose to leave this form and your tax documents with the front desk or you can choose to have a 10-15 minute meeting with your tax professional.

3

After your tax return is ready, you can come back in to the office to complete it or we can complete it online.

Are you a returning El Triunfo Tax Services Client? ☐ Y ☐ N

First time with us? Send us your last tax return and tell us how you heard about us: _____

Tax Year: _____

Filing Status: ☐ Single ☐ MFJ ☐ MFS ☐ HOH

Would you like to designate \$3 to the presidential campaign fund? ☐ Y ☐ N

TAXPAYER INFORMATION

Name: _____

Date of Birth: _____

SSN or ITIN: _____

Occupation: _____

Address: _____

City, State, ZIP: _____

Best Phone Number: _____

Email: _____

Preferred Contact Method: ☐ Email ☐ Text ☐ Phone

Can you be claimed as a dependent by someone else? ☐ Y ☐ N

SPOUSE INFORMATION

Name: _____

Date of Birth: _____

SSN or ITIN: _____

Occupation: _____

Address (If different): _____

City, State, ZIP: _____

Best Phone Number: _____

Email: _____

Are you or your Spouse / Dependent an active member of the military? ☐ Y ☐ N

DEPENDENTS (person you provide more than half of their support)

Name	Relationship	Date of Birth	SSN or ITIN	Full Time Student	Disabled?

INCOME:

(Check all that apply & include documents.)

- ☐ Employer (W-2)
- ☐ Interest (1099-Int)
- ☐ Social Security / Retirement (SSA-1099)
- ☐ Dividends (1099-Div)
- ☐ Stock or Mutual Fund Sale (1099-B)
- ☐ Unemployment (1099-G)
- ☐ Cancellation of Debt (1099-C)
- ☐ Buy / Sell Crypto Currency
- ☐ Other: _____

BUSINESSES:

(Check all that apply & include documents.)

- ☐ Self-Employment Income (1099-NEC)
- ☐ Credit Card Transactions (1099-K)
- ☐ Self-Employment Expenses
- ☐ Rental Property (Income / Rent)
- ☐ Rental Property (Expense)
- ☐ S-Corp, LLC, or Partnership (K-1)
PPP Loan / SBA Loan /
EDIL Grant / ERC or Other
- ☐ Single-Member LLC
- ☐ Automobile used for
business. Mileage _____

CREDIT & DEDUCTIONS:

(Check all that apply & include documents.)

- ☐ Donate cash or goods to a charity?
- ☐ Pay Student Loan interest? (1098-E)
- ☐ Pay Child / Dependent Care expense?
- ☐ Have a Mortgage Payment (1098)
- ☐ Make an IRA Contribution
- ☐ Pay Property Taxes?
- ☐ Tuition Paid (1098-T)
- ☐ Prepaid Taxes?
- ☐ Middle Class Tax Refund

HEALTH INSURANCE:

(Check all that apply & include documents.)

- ☐ Covered by a qualified private or
government health insurance plan?
- ☐ Enrolled in a health insurance plan
through the federal or state
marketplace?
- ☐ Received Form 1095-A, 1095-B,
or 1095-C
- ☐ Out-of-Pocket Medical /
Dental Expenses

MISCELLANEOUS:

(Check all that apply)

- ☐ Sell a home? (1099-S)
- ☐ Adopt a child?
- ☐ Suffer catastrophic loss?
- ☐ Have gambling winnings / losses?
- ☐ Take an IRA or 401(k)
distribution (1099-R)

DUE DILIGENCE:

(check all that apply & include documents.)

- ☐ Copy of Prior Year Tax Return
- ☐ Copy of Driver Licenses
- ☐ Copy of Taxpayer, Spouse, and
Dependents SSN / ITIN Cards
- ☐ Copy of Birth Certificates
for Dependents
- ☐ Proof of Health Insurance
- ☐ Proof Residence for Dependents

COMMENTS SECTION

TAXPAYER SIGNATURE: _____

DATE: _____

SPOUSE SIGNATURE: _____

DATE: _____

INTERNAL USE ONLY:

☐ PCS

☐ FCS

☐ ACS

☐ UTCS

☐ Client Portal