

NEW CLIENT INTAKE FORM - 1040

Taxpayer

| | | | | |
|-------------------|-------------|------------------|--------------|-----------------|
| <i>First Name</i> | <i>M.I.</i> | <i>Last Name</i> | <i>Email</i> | <i>IP PIN</i> |
| Occupation | | Date of birth | | |
| Address | | City | State | Zip |
| County | | Primary phone | | Secondary phone |
| Driver's License | No. | State | Issue Date | Exp. Date |

Spouse

| | | | | |
|--------------------------------------------------------|-------------|------------------|--------------|---------------------------------|
| <i>First Name</i> | <i>M.I.</i> | <i>Last Name</i> | <i>Email</i> | <i>IP PIN</i> |
| Occupation | | Date of birth | | Are you new to our firm? Yes No |
| Address <small>(if different from Taxpayer)</small> | | City | State | Zip |
| County | | Primary phone | | Secondary phone |
| Driver's License | No. | State | Issue Date | Exp. Date |

Date of move

Marital status at 12/31 Single Married Separated Widow(er) Registered Domestic Partnership (RDP) Unsure
 Were you divorced or separated during the year? Yes No Were there any deaths in the family? Yes No
 Individuals who are in registered domestic partnerships (RDPs) and civil unions are not considered married for federal tax purposes.
 Have you received any notice from the IRS or state revenue department within the past year? Yes No

| Names of dependent children <small>Child's full name</small> | Tax ID # * | IP PIN | Date of birth | Months lived in home | Relationship to taxpayer | College student? |
|-----------------------------------------------------------------|------------|--------|---------------|----------------------|--------------------------|------------------|
| | | | | | | |
| | | | | | | |
| | | | | | | |

Did any of the children have unearned income above \$1,150 for the year? Yes No Do any of the children have a disability? Yes No
 Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year Yes No

Other dependents or people who lived with you

| Name | Tax ID # * | IP PIN | Date of birth | Months lived in home | Relationship | Income |
|------|------------|--------|---------------|----------------------|--------------|--------|
| | | | | | | |
| | | | | | | |

Bank information: Use for Direct deposit of refund Direct debit of balance due Name of bank

Checking Savings Routing transit number Account number

Estimated Tax Payments

| Installment | Date paid | Federal | Date paid | State |
|-------------|-----------|---------|-----------|-------|
| First | | \$ | | \$ |
| Second | | \$ | | \$ |
| Third | | \$ | | \$ |
| Fourth | | \$ | | \$ |

Questions — All Taxpayers

(Provide related statements or other documentation.)

“You” refers to both taxpayer and spouse — enter “?” if unsure about a question.

| | | | | | | |
|----------------------------|-----|----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------|--------------------------|-------------------------------|
| LIFESTYLE & TAXES | Yes | No | Are either you or your spouse legally blind? | | | |
| | Yes | No | Did you pay or receive alimony | | Recipient's SSN | Date of divorce or separation |
| | | | Paid | Received | \$ | |
| | Yes | No | Did you purchase health insurance through a public exchange? | | | |
| | Yes | No | Will there be any significant changes in income or deductions next year, such as retirement? | | | |
| | Yes | No | Did you pay anyone for domestic services in your home? | | | |
| | Yes | No | Did you purchase a new energy-efficient car, truck, or van? | | | |
| | Yes | No | Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled? | | | |
| | Yes | No | Are you a member of the military? | | State of residency | |
| | Yes | No | Were you a citizen of or lived in a foreign country? | | Foreign country | |
| | Yes | No | Do you own or have financial interest in a foreign bank or financial account? Maximum value \$ | | | |
| CHILDREN & EDUCATION | Yes | No | Were any children born or adopted (Provide statement for other expenses.) | | | |
| | Yes | No | Were any children attending college? (Provide Form 1098-T.) | | | |
| | | | Year in college | Paid by you: Tuition \$ | Student loan interest \$ | Books \$ |
| | | | | Paid by student: Tuition \$ | Student loan interest \$ | Books \$ |
| | Yes | No | Did you pay any tuition for a private school for a dependent or take classes yourself? | | | |
| | | | Student | | | Amount paid \$ |
| | | | Name and address of school | | | |
| | Yes | No | Did you pay for child or dependent care so you could work or go to school? (add statement if needed) | | | |
| | | | Name of provider | | | EIN or SSN |
| | | | Address | | | Amount paid \$ |
| | Yes | No | Do you have any children who have unearned income of \$1,150 or more? | | | |
| Yes | No | Did you make any contributions to a 529 plan | | | | |
| INVESTMENTS | Yes | No | Did you, or will you, contribute any money to an IRA | | Traditional IRA | Roth IRA |
| | Yes | No | Did you roll over any amounts from a retirement account | | | |
| | Yes | No | Did you sell or transfer any stock or sell rental or investment property? | | | |
| | Yes | No | Did you receive any income from an installment sale? | | | |
| | Yes | No | Did you have any investments become worthless or were you a victim of investment theft | | | |
| | Yes | No | Were you granted, or did you exercise, any employee stock options during | | | |
| | Yes | No | Did you (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? | | | |
| DEDUCTIONS | Yes | No | Did you, or do you plan to, contribute money before April 1 to an HSA for ? If yes, provide details. | | | |
| | Yes | No | Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide details. | | | |
| | Yes | No | Did you pay sales taxes on a major purchase in , such as a vehicle, boat, or home? | | | |
| | Yes | No | Did you make any charitable contributions in ? If yes, provide details. | | | |
| BUSINESS | Yes | No | Did you work from a home office or use your car for business? (not as a W2 employee) | | | |
| | Yes | No | Did you receive income from a sharing/gig economy activity (e.g. Airbnb, Uber, etc.)?(1099-NEC or 1099K) | | | |
| | Yes | No | Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture? (need Sch C) | | | |
| HOME | Yes | No | Did you purchase or sell a main home during the year? If yes, provide closing statement. | | | |
| | Yes | No | If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details. | | | |
| | Yes | No | Did you refinance a mortgage or take a home equity loan? If yes, provide closing statement. | | | |
| | Yes | No | Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home? | | | |
| | Yes | No | Did you make any new energy-efficient improvements to your home? If yes, provide details. | | | |
| State information | | Full-year resident | Part-year resident | Nonresident | School district | |
| States of residence during | | and dates | | Do you rent or own your home? Rent Own | | |
| | | | | Total rent paid \$ | Includes heat? Yes No | |