

2023 CLIENT INFORMATION SHEET

BASIC INFORMATION

1. Tax Payer Name _____ Spouses Name _____
Date of Birth _____ Spouses Date of Birth _____
Social Security # _____ Social Security # _____
Occupation _____ Occupation _____
Address _____ Address _____
City, St Zip _____ City, St Zip _____
Telephone _____ Telephone _____

2. Filing Status (please circle one)
A Single- A Taxpayer whose marital status is unmarried.
B Married Filing Joint- A taxpayer and spouse that have agreed to file a joint return
C Married Filing Separate- A taxpayer and spouse that have to be responsible for their own
D Head of Household- Unmarried or considered unmarried (living apart from you spouse for the last 6 months of the year) on the last day of the year and pay over half the cost of maintaining a home for the year and is a principal residence of a qualifying dependent

3. Are you legally blind? _____ Is your spouse? _____
4. Can someone else claim you as a dependent? _____
5. Can someone else claim your spouse as a dependent? _____

6. Did you or your spouse attend college in 2023? _____
College Name _____
Do you have your 1098 T? _____
Do you have receipts for additional expenses? _____
Total amount of additional expenses _____

7. Do you have any of the following: AMOUNT
Interest or Dividends _____
Unemployment _____
Alimony _____
Social Security Benefits _____
Gambling Winnings _____
Self Employment _____

8. Are you Self Employed?
Do you have business license, business bank account, or business cards? _____
Do you have business receipts and income summary? _____
Do you Have 1099's? _____
Did you purchase Equipment? _____

EQUIPMENT	PURCHASE DATE	AMOUNT
_____	_____	_____
_____	_____	_____

9. Who All lives in your home:

Name _____	Relationship _____	How Long _____
Name _____	Relationship _____	How Long _____
Name _____	Relationship _____	How Long _____
Name _____	Relationship _____	How Long _____
Name _____	Relationship _____	How Long _____

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10. If you are married do you have a marriage license? _____
11. If you are divorced do you have a divorce decree? _____
12. If you have been separated for the last 6 months what type of proof can you provide?

DEPENDANT INFORMATION

13. Dependent Information

Name	SS#	DOB	Relationship	Employment	Months In Home	School
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_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

14. Can you supply the following proof for dependents? (please circle the items you have)

School Records _____	Daycare Records _____
Health Insurance or Medicaid Cards _____	SS Cards _____
Medical Records _____	_____

15. If you have dependents can you prove you supplied over half their support? _____

(please circle the items you have)

Utility Bills _____	Grocery Receipts _____	Property Tax Receipts _____
Rent Receipts _____	Household Repair Bills _____	

16. Do you receive any of the following assistance? (please circle the items you have)

Child Support _____	Food Stamps _____
Child Care Assistance _____	Housing Assistance _____
Medicaid _____	
WIC _____	

Who all are listed on the support? _____

17. Are any of the above dependents legally handicapped or mentally retarded?

Which Dependent? _____
If over age 18 we need written documentation before taxes can be filed.

18. Are any dependents in daycare or after school care? _____

Provider Name _____ ID number _____
Child Care Expense _____

19. If any of the dependents are not your biological children we will need additional information.

Where is the Mother? _____ Did She Work? _____ Amount: _____

Where is the Father? _____ Did He Work? _____ Amount: _____

We will need copies of school and doctor records listing you as guardian before taxes can be filed.
If court ordered we need copies before taxes can be filed.