

Tax Interview Sheet
Returning Client

Date: _____

Filing for Tax Year: _____

Name: _____ ** We need current copies of driver's license

Spouse Name: _____

Address change: Yes No Email: _____

Address: _____

Home Phone Number: _____ Cell Phone Number: _____

Best time to call: _____ Preferred method of contact: call email

Bank Account information changes? Same New Mail refund

New Bank information

Bank Name: _____ Account Number: _____ Savings or Checking

Filing Status: Married Single Married filing separate Single with dependents (HOH)

Is this filing status changed from last year? Yes No Previous status: M S MFS HOH

Dependents: **We need copies of Social Security cards for all new dependents

Name:	Date of Birth:	New	Student	Disabled
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

How many months did these dependents live in your home: _____ months

Did you provide over half of the support for those you are claiming as a dependent? Yes No

Do you have any student loans or pay any tuition? Yes No

Did you purchase health insurance from the Marketplace (healthcare.gov)? Yes No Include 1095A

Did you receive any unemployment? Yes No Did you receive any interest or dividend income? Yes No

Did you receive any Social Security? Yes No Did you receive any 1099R (retirement)? Yes No

Did you receive any self-employment 1099-Misc or 1099-NEC? Yes No Please leave a list of expenses and mileage

Is your business an S-Corp, C-Corp, LLC or Partnership? _____

Estimated tax payments? Yes No Include amounts and dates paid.

We need a copy of each of these forms for income listed above: 1099G, 1099DIV, 1099INT, SSA1099, 1099R, etc.

Did you receive/sell/exchange/dispose of any virtual currency or digital assets? Yes No

Any other income: _____

Child care expenses? Yes No Provider: _____ Amount: _____

Address: _____ ID #: _____

Office Use:

W2's _____ 1099 Retirement _____ Social Security Statements _____

Unemployment forms _____ Interest statements _____ Dividend Statements _____

1099MISC/1099NEC _____ Marketplace 1095A _____ Other _____

Notes:

Interviewer Initials _____