



When was the last Year we filed your taxes. 2022  2021  2020

Taxpayer/Primary Name \_\_\_\_\_ SSN \_\_\_\_\_ - \_\_\_\_ - \_\_\_\_ DOB \_\_\_\_/\_\_\_\_/\_\_\_\_

Spouse Name \_\_\_\_\_ SSN \_\_\_\_\_ - \_\_\_\_ - \_\_\_\_ DOB \_\_\_\_/\_\_\_\_/\_\_\_\_

Address \_\_\_\_\_ Phone \_\_\_\_\_

e-mail \_\_\_\_\_

Tax Payer Occupation \_\_\_\_\_ Spouse Occupation \_\_\_\_\_

**\*\*If you are a repeat client, please write your last name, last 4 digits of social & fill in only changes.\*\***

**\*\*New Clients, please complete ALL sections.\*\***

- Single  Married Filing Joint  
 Married Filing Separately  Unmarried Head of Household

Dependent Name	SSN	DOB	Relationship	Full-Time Student		
				Yes	No	
	- -	/ /		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	- -	/ /		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	- -	/ /		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	- -	/ /		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**For Direct Deposit and Direct Withdrawals**

Name of Bank	Routing #	Account #

DAYCARE	EIN#	ADDRESS	AMOUNT PAID
	- -		

- If you received Medical Coverage/Obama Care in 2023 there is a form 1095-A. (if yes, attach form)**
- Did you claim unemployment in 2023? (if yes, attach statement.)**

I/We certify that we have submitted all applicable source documents for our tax preparation for the tax year 2023 and the taxes were prepared based on those documents submitted by us.

If I/We are not completing the tax return with the firm, we will pay a minimum of \$100 before obtaining all source documents back.

Signature \_\_\_\_\_

Spouse Signature \_\_\_\_\_

Date \_\_\_\_\_

**FOR OFFICE USE ONLY**

OTHER REMARKS:



INPUT BY: \_\_\_\_\_ DATE: \_\_\_\_\_ CHECKED BY: \_\_\_\_\_

\_\_\_\_\_  
Business Name

\_\_\_\_\_  
EIN/SSN

**Business Income and Expenses**

**Exhibit A  
For Schedule - C, LLC's, Corp's, Partnership's**

<b>RECEIPTS &amp; INVENTORY</b>			<b>REMARKS</b>
	Gross Receipts	\$	
	Other Income	\$	
<b>EXPENSES</b>			
	1099 Issued	\$	
	Wages paid	\$	
	Advertising	\$	
	Car & Truck Expenses	\$	
	Commissions & Fees	\$	
	Contract Labor	\$	
	Development Costs	\$	
	Insurance	\$	
	Meals & Entertainment	\$	
	Loan Interest - Business Related	\$	
	Legal/Professional Fees	\$	
	Office Expense	\$	
	Postage & shipping	\$	
	Pension & Profit-Sharing Plan	\$	
	Rent/Lease	\$	
	Repairs & Maintenance	\$	
	Supplies	\$	
	Taxes & License	\$	
	Telephone	\$	
	Education & Training	\$	
	Travel	\$	
	Utilities	\$	
	Utilities	\$	
<b>OTHER EXPENSES</b>			
<b>ASSETS PURCHASES</b>			
	Description	\$	
<b>DATE OF PURCHASE</b>			
	Opening Inventory	\$	
	Purchases	\$	
	Ending Inventory	\$	

**(WE ARE ATTACHING PROOF OF INCOME & EXPENSES, BANK STATEMENTS, CREDIT CARD STATEMENTS, CASH RECEIPTS, CANCELLED CHECKS ETC)**

