

Tax services intake form - English

Year ____ Gross Income _____		Expenses	
<p>1: Client Information</p> <ul style="list-style-type: none"> - Full Name/Company Name: - Social Security Number (SSN) <p>or company EIN:</p> <ul style="list-style-type: none"> - Date of Birth: - Phone Number: - Email Address: - Address: 		Travel - hotel, air Taxi, bus, train Bank service charges Rent payments - apartment Telephone service Electricity Cell phone purchase	
<p>2. Spouse Information (if applicable)</p> <ul style="list-style-type: none"> - Full Name: - Social Security Number (SSN): - Date of Birth: - Phone Number: - Email Address: 		Mortgage interest Insurance - liability Real estate taxes Licenses & permits Insurance - property hazard Legal & professional HOA/maintenance fees	
<p>3. Filing Status (check one):</p> <ul style="list-style-type: none"> - Single - Married Filing Jointly - Married Filing Separately - Head of Household - Qualifying Widow(er) 		Repairs - property Charitable contributions Protective clothing & equipment. Car or truck purchase price Computer purchase Lease - car Software	
<p>4. Dependents</p> <ul style="list-style-type: none"> - Full Name(s), SSN(s), <p>Date(s) of Birth, Relationship(s), and if they lived with you for more than six months.</p>		Insurance - car/truck Equipment rental expense Registration or DMV - vehicle Storage rental expenses Car wash (truck) Postage & shipping	
<p>Section 2: Income Sources</p> <p>Total Gross receipts // Sales _____</p> <p>1. Employment Income</p> <ul style="list-style-type: none"> - W-2 Forms <p>2. Self-Employment Income</p> <ul style="list-style-type: none"> - 1099-NEC - Business Income/Expenses 		Parts - car or truck Car & truck expenses Tires Security & guards Garage rent Tools Repairs & maintenance - auto Dry cleaner expense Car or truck rental expenses Repairs & maintenance Number of days (DOT - 69) Business Gifts	

<p>3. Investment Income</p> <ul style="list-style-type: none"> - Interest (1099-INT) - Dividends (1099-DIV) - Capital Gains/Losses (1099-B) <p>4. Retirement Income</p> <ul style="list-style-type: none"> - Social Security (SSA-1099) - Pension/Annuity (1099-R) <p>5. Other Income</p> <ul style="list-style-type: none"> - Unemployment (1099-G) - Rental Income - Alimony Received - Gambling or Lottery Winnings (W-2G) - Cryptocurrency Transactions - Other: (please specify) 		<p>Supplies</p> <p>College or university costs</p> <p>Child care expenses</p> <p>Medical or dental expenses</p> <p>Parking fees</p> <p>Dues & subscriptions</p> <p>Oil change</p> <p>Education & training</p> <p>Tolls expense</p> <p>Interest expense</p> <p>Commissions & fees</p> <p>Utilities</p>	
<p>Section 3: Deductions and Credits</p> <p>1. Adjustments to Income</p> <ul style="list-style-type: none"> - IRA Contributions - Student Loan Interest Paid - HSA Contributions - Educator Expenses 		<p>Natural gas, water, garbage</p> <p>Meals - business</p> <p>Internet Internet service</p> <p>Janitorial & cleaning expenses</p> <p>Office expenses</p> <p>Advertising & marketing</p> <p>Diesel</p>	
<p>2. Itemized Deductions</p> <ul style="list-style-type: none"> - Mortgage Interest (Form 1098) - Property Taxes - Charitable Contributions - Medical Expenses (exceeding 7.5% of income) - State and Local Taxes 		<p>Tax preparation fee</p> <p>Plumbing & electrical</p> <p>Contract labor</p> <p>Paint & carpet</p> <p>Rent or lease expenses</p> <p>Pest control</p> <p>Gasoline</p>	
<p>3. Credits</p> <ul style="list-style-type: none"> - Child Tax Credit - Dependent Care Credit - Education Credits (1098-T) - Earned Income Tax Credit - Adoption Credit - Energy-Saving Home Improvements 		<p>***. Special Circumstances or Notes</p> <ul style="list-style-type: none"> - List any unusual events this year (e.g., buying/selling a home, divorce, major medical expenses, inheritance) 	