

Existing Clients only fill out this page if you have had CHANGES to your information. If no changes, please skip to the next page.

Client Intake Review Sheet

You will need:

- All tax information received such as forms W-2, 1099, 1098, 1095
- Social Security Cards or ITIN letters for all persons on your tax return
- Picture ID (such as a valid driver's license) for you & your spouse

Personal Information			T								
	Market Montage		lax	oayer				Spou	se		
First Name & Middle Initia	11							- 10-7			
Last Name											
Social Security Number							- Particular II				
Date of Birth											
Occupation											
Email Address											
Best Contact Number				5.1.30							
Home Address											
Mailing Address (if differen	nt)										
Taxpayer Lega	lly Blind Y	'es	No			Spou	se Legally	Blind Ye	s	No	
Parket (Company)					No						
Taxpayer Full-Time	Student Y	ent Yes		Spouse Full-Time Student Yes				No			
Can anyone else clain your spouse as a dep		Yes No			Donation	n to Preside	ential Cam	npaign Ye	s	No	
Filing Status (Circle): S	ingle Vidower	Head o				rried Filing	Jointly	Married F	iling Sep	arately	
		Dep	ende	nts (C	hildren &	Others)					
First & Last Name	Relationship	Date of Bir	th		l Security imber	Months Lived with you	US Citizen (Yes/No)	Single or Married as of 12/31/22	Disabled (Yes/No)	Depend Gros Incor	ss

Yes	No	Amount	Income - Last year did you or your spouse receive:						
			Wages/Salary (Form W-2)						
			Tip Income						
		2,	Scholarships (Forms W-2, 1098-T)						
			Interest/Dividends from: Checking/Savings, Bonds, CD's, etc. (Forms 1099-INT, 1099-DIV)						
			Refund of State or Local Income Tax (Form 1099-G)						
			Alimony Income or Separate Maintenance Payments						
			Self-Employment Income (Forms 1099-MISC, 1099-NEC, Cash)						
			Trade Virtual Currency (Need amounts from accounts Income/Loss)						
			Income/Loss from Sale/Exchange of Stocks, Bonds, Real Estate (Forms 1099-S, 1099-B)						
			Disability Income (Forms 1099-R, W-2)						
			Retirement Income or Payments from Pensions, Annuities, and/or IRA (Form 1099-R)						
		11 7	Unemployment Compensation (Form 1099-G)						
			Social Security or Railroad Retirement benefits (Forms SSA-1099, RRB-1099)						
			Income/Loss from Rental Property						
			Penalty on a Tax Deposit						
			Other Income/Loss (Gambling, Lottery, Prizes, Jury Duty, Schedule K-1, Royalties, Foreign Income)						
Yes	No	Amount	Expenses - Last year did you or your spouse incur:						
			Alimony or Separate maintenance Payments						
			Contributions or Repayments to a Retirement Account (Circle: IRA, 401K, Roth IRA, Other)						
			College or Post-Secondary Educational expenses (Yourself, Spouse, dependents Form 1098-T)						
			Student Loan Interest (From 1098-E)						
			Child Care or Dependent Care Expenses (Providers Name and EIN/SS#)						
			Expenses to Self-Employment Income (Bring in Itemized Totals)						
			Medical/Dental (Including Insurance Premiums/Medicare Premiums)						
			Hospital Expenses						
			RX/DR/Hospital Miles						
			Other Medical Expenses (Ambulance/X-Rays/Labs/Glasses/Hearing Aids)						
			Prescriptions Paid						
			Primary Mortgage Interest (Form 1098) (1st, 2nd Mortgages)						
			Vacation/Second Home Mortgage Interest (1st, 2nd Mortgages)						
			Business Related Interest						
			Taxes (State, Real Estate, Personal Property, Sales Tax, Privilege Tax on All Vehicles)						
		or brings.	Did you buy and pay sales tax on a large purchase such as vehicle, boat, ATV etc. (Bring Receipt)						
			Charitable Contributions (Cash - Churches, Salvation Army, Non-Profit, School, etc.)						
			Charitable Contributions (Items (Car) - Churches, Salvation Army, Non-Profit etc.)						
			Travel on behalf of the Charities (List Miles)						
			Federal Estimates Tax Payments (April/June/September/January)						
			State Estimates Tax Payments (April/June/September/January)						
Yes	No	Amount	Life Events - Last year did you or your spouse:						
			Buy or sell a home, rental property, or any other real property						
			Have a Health Savings Account (Forms 5498-SA, 1099-SA, W-2 with code in box 12)						
			Have a Credit Card, Student Loan or Mortgage Debt Cancellation (Form 1099-C, 1099-A)						
			Adopt a child						
			Have Earned Income Credit, Child Tax Credit or American Opportunity Credit disallowed in prior year						
			Purchase & Install Energy Efficient Home Items (such as Windows, Furnace, Insulation, etc.)						
			Make Estimated Tax Payments or apply last year's refund to this tax year						
			File a Federal Return last year with a "Capital Loss Carryover" (Form 1040, Schedule D)						
			Receive Advanced Child Tax Credit Payments						

Do you want to electronically file your Return (Circle One): YES NO

If you are due a refund, would you like (Circle One): Direct Deposit
Paper Check Direct Deposit Information:

Bank Name:

Account #:

Routing #: