

Yes	No	Amount	Income - Last year did you or your spouse receive:
			Wages/Salary (Form W-2)
			Tip Income
			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)
			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)
			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 #: