Sierra Financial

309 E. John St., Suite 2
Carson City NV 89706

IMPORTANT

THIS IS YOUR INCOME TAX APPOINTMENT CONFIRMATION & INFORMATION WORKSHEET

Your appointment is with: ______________________________

Date: ______________________________

Time: ______________________________

Important: Please Read

OUR LOCATIONS:

Carson City: 309 East John St., Suite 2, Carson City, NV 89706 (the corner of Stewart & John Street)
Phone number (775) 885-7500 · Fax (775) 885-1079
Fallon: 601 S. Maine St., Suite C, Fallon, NV 89406 (across from Churchill County Library)
Phone number (775) 481-7393 · Fax (775) 885-1079

- NEW CLIENTS Must bring in IDs and last year's federal return & state return, if you had one
- If you sold any property such as a residence, stocks or bonds, mutual funds, or land please bring purchase documents and sale documents
- Children must have social security numbers (if not, please apply for one)
- Please have all W-2s, 1099s, Pension/Retirement, Social Security Benefits, Unemployment Compensation, Interest/ Dividend, and Gaming Statements
- All mileage and deductible expenses totaled by category, such as Advertising, Office Expense, Telephone, Utilities etc.
- Client Intake Review Sheet is a reminder of what information to bring in/or drop off

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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	Taxpayer	Spouse
First Name & Middle Initial		
Last Name		
Social Security Number		
Date of Birth		
Occupation		
Email Address		
Best Contact Number		
Home Address		
Mailing Address (if different)		

Taxpayer Legally Blind	Yes		No		Spouse Legally Blind	Yes		No	
Taxpayer Disabled (permanently)	Yes		No		Spouse Disabled (permanently)	Yes		No	
Taxpayer Full-Time Student	Yes		No		Spouse Full-Time Student	Yes		No	
Can anyone else claim you or your spouse as a dependent	Yes		No		Donation to Presidential Campaign	Yes		No	

Filing Status (Circle): Single Head of Household Married Filing Jointly Married Filing Separately
Widower Year of Spouse death? ____________

Dependents (Children & Others)

First & Last Name	Relationship	Date of Birth	Social Security Number	Months Lived with you	US Citizen (Yes/No)	Single or Married as of 12/31/22	Disabled (Yes/No)	Dependents Gross Income

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 #:

DELIVERY OF DOCUMENTS & FEE SCHEDULE

Delivery of Documents:

1. **Drop-off to front desk at one of our locations:** If you do not require an appointment, please bring completed CLIENT INTAKE REVIEW SHEET and ALL supporting documents to our office. Drop boxes are located at both locations if office is closed for after hour convenience. We will call/email/texted with questions, so please tell us your preferred way for contact.

2. **Email:** Email addresses are listed below and are set-up for client privacy and security.

   Carson City Office:

   For Melanie Ludlow: sfataxes@gmail.com
   For Alyssa Garcia: sierrataxcarson@gmail.com

   Fallon Office:
   For Ty Ludlow: sierrafinancial@yahoo.com

3. **Mail:** Please complete the Client Intake Review Sheet and mail with ALL supporting documents to either:

   Sierra Financial
   309 East John St., Suite 2
   Carson City, NV 89706

   or

   Sierra Financial
   601 S. Maine St., Suite C
   Fallon, NV 89406

4. **Fax:** Please fax all documents to (775) 885-1079

5. **Schedule an appointment:** Please schedule an appointment if you are a new client, and/or you feel you need an in-person consultation about significant situations or changes from the prior year. Please bring all supporting tax documentation with you. Telephone appointments are also available upon request.

Extension of Filings: Not all returns can be filed by April deadline because of late arriving information or back-log in our office. Returns received in the office after April 1st may not be completed by the April deadline. However, any taxes that are still due by the April deadline that may require some additional work and/or a tax extension can be determined. Extensions can be filed with the IRS by our office with a written request for an additional fee of $25 for personal and $50 for business returns. Our office is not responsible for any penalties for underpaid taxes.

Tax Preparation Fee Guide

Basic 1040 Return preparation includes the following items:

- W-2s
- Student Loan
- Interest & Dividends Income
- Schedule A Deductions
- Social Security Income
- Pension/Retirement Statements

Additional Fees will apply for returns that include the following items. The additional charges depend on the complexity of the situation to complete the return:

- Investments beyond interest/dividends
- Stock Options
- Self-Employment (Schedule C)
- Rental Properties (Schedule E)
- Earned Income Credit Worksheet
- Premium Tax Credit Worksheet
- State Returns
- K-1s
- HAS Contributions & Distributions
- Farm Income & Expenses (Schedule F)
- Depreciation Schedules
- Sales/Purchase of Real Estate (Primary or Rental)
- Extensions & Amendments
- Multiple State Returns