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We have created this form to make it easier for you to gather your income tax information. Please complete and drop off along with all your official tax documents. Do not attach receipts unless requested.

Taxpayer*

Spouse*

Name: Social Security #: Date of Birth: Occupation: Phone Number: Preferred Email: Address: City: State: Zip: Referred By: (If new)

*If returning client and the above information has not changed check here _____. Otherwise update changes above.

Dependents

Table with 5 columns: Name, Social Security #, Date of Birth, Income, # of Months Child Lived With You During 2024

Questionnaire

Did you trade any virtual currency during 2024? If yes, attach Form 1099-B. Did you make any charitable donations during 2024? If yes, provide amounts below. Cash, check, credit card, or payroll \$ Non-cash: \$ Did you pay child care costs for a dependent child under the age of 13 during 2024? If yes, attach daycare statement showing provider name, address, Tax ID# and amount paid. Did you pay any college tuition in 2024? If yes, attach Form 1098-T. Student's Name Grade or Year in College Cost of Books and Supplies \$ \$ Did you make any energy-efficient home improvements to your home during 2024? \$ Insulation \$ Water Heater \$ Exterior Doors \$ Furnace or Hot Water Boiler \$ Exterior Windows & Skylights \$ Home Energy Audit \$ Central Air Conditioner \$ Other If you receive a refund, would you like direct deposit? If yes, provide a voided check if not on file.

By signing below you acknowledge that, to the best of your knowledge and belief the information contained on this form is both accurate and complete.

Signature Date Signature Date