

BASIC TAXPAYER INFORMATION TAX YEAR 2024

TAXPAYER	Last Name _____	Last Name _____
	First _____	First _____
	Middle Initial _____	Middle Initial _____
	SSN _____	SSN _____
	Date of Birth _____	Date of Birth _____
	Occupation _____	Occupation _____

Address _____
 City _____ State _____ Zip Code _____

Email address* (important) _____

***Please note: We will not Electronically File your return if you do not have at least one good contact phone. ***

Home Phone (____) _____-____-____ Business Phone (____) _____-____-____
 Cell Phone (____) _____-____-____ Other Phone (____) _____-____-____

FILING STATUS (CIRCLE ONE):

- 1= SINGLE**
- 2= MARRIED FILING JOINT**
- 3= MARRIED FILING SEPARATE****
 (**Must list spouse's name & Social Security # above)

- 4= HEAD OF HOUSEHOLD**
- 5= QUALIFYING SURVIVING SPOUSE; YEAR SPOUSE DIED _____**

Did you live with your spouse during 2024?
 Yes ___ No ___ Dates? From _____ to _____

***Do you want to donate \$3.00 of any tax you pay to the Presidential Fund?**
 YES _____ NO _____

LIST YOUR DEPENDENTS -(Do NOT list spouse here, list at top only.)

Full Name	Birthdate MM/DD/YY	Social Security # (cannot e-file without it)	Relationship	Months in home in 2024	Total Income

Is there a possibility that someone else may claim one of your dependents? YES _____ NO _____
Is there a possibility that someone can claim YOU as a dependent? YES _____ NO _____

THE LEAST EXPENSIVE WAY TO FILE IS BY DIRECT DEPOSIT FROM IRS. THIS IS RECOMMENDED IF YOU CAN PAY ALL FEES BEFORE YOUR TAX RETURN IS FILED. WOULD YOU LIKE THIS? YES NO

DO YOU WANT THE REFUND TO PAY FOR TAX PREPARATION? ** YES _____ NO _____
 (IF YOU DO NOT HAVE A BANK, THIS IS THE FASTEST OPTION FOR YOU)

FOR THIS OPTION THERE IS AN **ADDITIONAL COST OF \$90 - \$115 FED ONLY; \$100 - \$125 FED & STATE**
 DO YOU WISH TO APPLY FOR THE **LOAN ADVANCE** OF \$500-\$7000? YES ___ NO ___ (MUST QUALIFY)

NAME AND PHONE NUMBER OF CLOSEST RELATIVE **NOT** LIVING WITH YOU:

NAME _____ PHONE# _____ RELATIONSHIP _____

PLEASE HAVE TWO FORMS OF ID READY. ONE MUST HAVE A PICTURE.

W-2, INCOME & HEALTH COVERAGE INFORMATION Tax Year 2024

1. I (or my spouse and I) have received **all W-2** and **unemployment** information that I (or we) expect to receive for **all** jobs worked during this tax year. **YES NO**
2. I (or we) have received **all** information from **interest** or **dividend** paying accounts that I (or we) expect to receive. **YES NO**
3. I (or we) are reporting **all income** from **all jobs**, including those that **paid** only in **cash**. **YES NO**
4. I have submitted health coverage documents (**Form 1095-A**) for myself, spouse (if applicable) and my dependents to assist in preparing my tax return. *****THIS APPLIES ONLY IF YOU HAD INSURANCE PURCHASED THROUGH THE HEALTH INSURANCE MARKETPLACE (OBAMACARE). ***** **YES NO**

FOREIGN ACCOUNT AND VIRTUAL CURRENCY QUESTIONS

- DO YOU HAVE ANY INTEREST IN ANY **FOREIGN** ACCOUNTS? **YES NO**
- DO YOU HAVE ANY **AUTHORITY** OVER ANY **FOREIGN** ACCOUNT OR TRUST? **YES NO**
- AT ANY TIME IN **2024**, DID YOU RECEIVE, SELL, SEND, EXCHANGE OR DISPOSE OF ANY FINANCIAL INTEREST IN ANY **VIRTUAL** (CRYPTO) CURRENCY? **YES NO**

****I understand that if I do not have all of my W-2, unemployment, interest, dividend, other income information, or health coverage information, it may result in my tax return being incorrect. I am aware that there will be a \$75 fee (minimum) plus the cost of any forms needed for amending (correcting) a FEDERAL return.****

*We will prepare your **2024** joint federal income tax return and income tax returns for the states of _____ (collectively, the "returns"). This engagement pertains only to the **2024** tax year, and our responsibilities do not include preparation of any other tax returns that may be due to any taxing authority.*

Our services are not intended to determine whether you have filing requirements in taxing jurisdictions other than the one(s) you have informed us of. If because of documents you provide we determine that you must file to another taxing jurisdiction, we will inform you and prepare it.

- **By signing below, you are stating that you understand the statements above and your answers are true.**

Signature: _____ Date: _____