

TaxPayer	Spouse
NAME _____	NAME _____
Social Security # _____	Social Security # _____
D.O.B _____	D.O.B _____
Job Title _____	Job Title _____
Cell Phone: () _____	Cell Phone: () _____
email: _____	email: _____
If you are an ITIN is it renewed? Y / N	If you are an ITIN is it renewed? Y / N
Can anyone claim you as a dependent? Y / N	Can anyone claim you as a dependent? Y / N
Lived in the U.S. at least 183 days? Y / N	Lived in the U.S. at least 183 days? Y / N

Address: _____ Apt # _____ City: _____ State: _____

Filing Status: Single Married Separated Widower

Health Coverage: (1095-B employer/Medi-cal) (1095-A covered Calif.) (HSA distribution)

	IRS Pin # for filing
	W2's Last paystub to match W2's
	1099-DIV Divident Income
	1099-S Sale of Home
	1099-B Sale of Stocks /Robinhood
	SSA1099 Social Security Benefits
	1099-E Student Interest from Loans
	W2-G Gambling Losses:
	1099-G Unemployment
	1099-R Retirement Distribution
	1098-T Tuition Statement
	1099-INT Interest Income
	Pay rent: \$ _____ LandLord: _____

Direct Deposit		
Routing #:	_____	
Account #:	_____	
Savings	or	Checking

\$ _____

Paid Family Leave

Reason: _____

School Expenses: \$ _____

Banks Credit Unions Mortgage company

Home Owners	Business	Rental Property
1st: 1098 Mortgage	EIN #:	Rents Collected
1099- interest	DBA:	Other Cash
Solar Energy Exp.	Cash	1st: 1098 Mortgage
DMV car registr.	1099-K: Credit Card	2nd: 1098 Mortgage
ATV registra.	1099-Nec	Property Taxes
Property Taxes	Uber/Lyft/Doordash	Yard Maintenance
Boat Purchase	Merchandise Exp	Management fees
Car purchase	Supplies Exp	Property Insurance
Cash Donations	Phone Exp.	Utilities: Water
Goodwill	Total car Miles	Utilities: Trash
Union Dues	Business Miles	Utilities: Gas
Medical Expenses	P & L statement	Repairs

I/We hereby consent to the disclosure of tax information noted above and allow the tax preparer to enter a PIN on my behalf to verify that I/We certify all information is true & correct.

TaxPayer Signature _____ Date _____

Spouse Signature _____ Date _____