Individual Tax Return Information Required

Do not skip required questions. If a question does not apply, please write in N/A. If you need more space, please use additional pages. When you complete this form, please print it, sign and date at the bottom to scan for us.

Primary Tax Payer Name and Occupation/Job Title:
Secondary Tax Payer Name and Occupation/Job Title:
Contact Phone Number:
Email Address:

Marital Status (select): Single / Married Filing Separate / Married Filing Joint / Head of Household / Widow(er) / Registered Domestic Partnership (RDP)

Please list all individuals (including yourself) listed on your Tax Return including all dependents:
Type NAME, DATE OF BIRTH and SOCIAL SECURITY NUMBER for EACH person (or attach separate document).

YOUR HOME
Current Address:

State of Residence for tax year: Please choose one: Full Year / Partial Year / Non-Resident
Do you own or rent your home: What is your CURRENT primary address:
Do you have dependents? If so, how many months of the year did they live with you?

EXPENSES (for any questions below where you answer yes, list the item and the expense amount):
Did you pay any college expenses for anyone?
Did you have daycare or childcare expenses?
Did you have any large purchases with sales tax?
Did you make any energy efficient purchases?
Did you have more than average medical expenses?

TAXES
Did you pay estimated taxes? If so, list dates and amounts.
Have you received any IRS or State notices this year?
If you are receiving a refund and want direct deposit, list your bank name, routing & account number.
Do you owe any prior year IRS debt? Are you on an IRS installment plan?
Did you invest in a retirement plan outside of your job?
Did you buy/sell any stocks?
Did you take a retirement plan distribution?
Did you buy/sell (FLIP) any homes?

Required Questions from the IRS (You must type yes or no for each question).
Does the tax payer or spouse have any interest or signature over a foreign financial account?
If yes, was the total value $10,000 or more during the year at any time?
Does the tax payer or spouse have any digital currency?
Does the tax payer, spouse and dependents have health insurance coverage for the entire year?
If yes, did you receive a form 1095A, 1095B or 1095c?

Stimulus and Tax Credits
Did you receive any stimulus in 2020 or 2021? If so, what dates and amounts?
Do you believe the amount you received is incorrect or "short"?
Did you NOT receive stimulus but you feel you should have?
Did you receive any notices from the IRS regarding the Child Tax Credit?