

# Client Interview Sheet

You will need:

- Tax information documents (W-2, 1099, 1098, etc.) *\*No paystubs*
- Valid, non-expired picture identification (Bank products) for self and spouse (if applicable)
- Proof of ID/Social Security Number for all persons on the tax return.

## General Taxpayer Information

Name	SSN	DoB	Occupation	
Primary:	- -	/ /		
Spouse:	- -	/ /		
Address	City	State	ZIP	
Phone Number	E-Mail			
Filing Status (Select one)				
Single	Married, Joint	Head of Household	Married, Separate	Qualifying Widow(er)

*Separate filers, please include spouse information in the spaces above!*

## Dependent Information

Name	SSN	DoB	Relationship
		( / / )	
		( / / )	
		( / / )	
		( / / )	

## Education Information

Student	SSN	Qualified Expenses	1098-T?
Do the student(s) have Form(s) 1098-T?	Yes	No	Who?
Has any student taken the AOC for any 4 prior tax years?	Yes	No	Who?
Has any student already taken 4 prior years of post-secondary education?	Yes	No	Who?
Has any student been convicted for possession or distribution of a controlled substance?	Yes	No	Who?
Was any student NOT at least a half-time student?	Yes	No	Who?

## Due Diligence/Verification Information

Have you ever been denied the Earned Income Credit?	Yes	No
Can anyone else claim you as a dependent?	Yes	No
Did you pay for any daycare/babysitter expenses?	Yes	No
If any dep. are students/disabled, do you have proof?	Yes	No
If self-employment income is present, do you have proof?	Yes	No

## Healthcare Coverage Information

Self	Employee	Marketplace	No Coverage
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## Miscellaneous Information

Do you commonly itemize your return?	Yes		No	
Do you pay a mortgage on your home or other property?	Yes		No	
Do you pay rent?	Yes		No	
Heat included?	Yes		No	
Do you have any medical, dental, or vision expenses?	Yes		No	
Have you made any donations to churches or charities?	Yes		No	
Any work-related expenses, like union dues or uniforms?	Yes		No	
Did you withdraw up to \$100,00 from retirement funds in 2020?	Yes		No	
Did you make any energy efficient home purchases?	Yes		No	
At any time during 2022, did you incur business mileage?	Yes		No	
If yes, indicate your mileage as follows:	Jan – Jun:		Jul – Dec:	
Any additional information (Which dependent has disability, rental income, etc.)?				

## Digital Assets

Did you (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?	Yes		No	
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## Form 1099-K

Did you receive any 1099-K issued by a third-party payment network such as PayPal, Venmo, etc.?	Yes		No	
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## Refund Method

Paper Check	Direct Deposit	Bank Name:	SALY
		Routing:	Checking
		Acct #:	Savings

By signing below, myself and my spouse (if applicable) agree that the contents of the above pages are accurate to the best of my/our knowledge, and do not hold the preparer or business liable for any omissions or inaccurate information contained herein:

Name:		Date:	
Name:		Date:	

How did you hear about us?

Facebook		Google		LinkedIn		Referral (from):	
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