

**(FOR OFFICE USE ONLY)**

New Client:                      Yes                       No

Received Date:

Assigned to:

Completed:

Pickup Date:

Scanned Photo ID

Scanned S.S. Card

Previous Year Taxes:

**Notes:**

**Tax preparer will fill out this form with you (DO NOT FILL OUT)**

Y	N	INCOME
<input type="checkbox"/>	<input type="checkbox"/>	Interest and/or Dividend Income
<input type="checkbox"/>	<input type="checkbox"/>	Alimony Income
<input type="checkbox"/>	<input type="checkbox"/>	Business Income
<input type="checkbox"/>	<input type="checkbox"/>	Automobile Mileage/Expenses
<input type="checkbox"/>	<input type="checkbox"/>	Gains/Losses from Sales of Stocks, Securities & Capital Assets
<input type="checkbox"/>	<input type="checkbox"/>	<b>Income or Loss from S Corporation, Partnership, LLC &amp; Trust</b>
<input type="checkbox"/>	<input type="checkbox"/>	Income or Loss from Rentals & Royalties
<input type="checkbox"/>	<input type="checkbox"/>	Income or Loss Farm
<input type="checkbox"/>	<input type="checkbox"/>	Unemployment Compensation
<input type="checkbox"/>	<input type="checkbox"/>	IRA or Annuity Distribution (confirm if split in 3 years)
<input type="checkbox"/>	<input type="checkbox"/>	Gambling Winnings
<input type="checkbox"/>	<input type="checkbox"/>	Cancellation of Debt/Sale of Home/Foreclosures/Short Sale
<input type="checkbox"/>	<input type="checkbox"/>	Do you have an Identity Protection PIN from the IRS?

**ADJUSTMENTS TO INCOME**

<input type="checkbox"/>	<input type="checkbox"/>	Alimony Paid
<input type="checkbox"/>	<input type="checkbox"/>	Moving Expenses <b>(only for taxpayers who are members of the military)</b>
<input type="checkbox"/>	<input type="checkbox"/>	Do you have a Health Savings Account or Health Insurance?
<input type="checkbox"/>	<input type="checkbox"/>	Did you contribute to an IRA? or other Retirement Plan?
<input type="checkbox"/>	<input type="checkbox"/>	Did you "roll over" a retirement plan distribution into another plan?
<input type="checkbox"/>	<input type="checkbox"/>	Educator Expenses for Teachers
<input type="checkbox"/>	<input type="checkbox"/>	Student Loan Interest

**TAXES & CREDITS**

<input type="checkbox"/>	<input type="checkbox"/>	Estimated Taxes
<input type="checkbox"/>	<input type="checkbox"/>	Child or Dependent Care Expenses
<input type="checkbox"/>	<input type="checkbox"/>	Home Energy Credit
<input type="checkbox"/>	<input type="checkbox"/>	Alternative Motor Vehicle Credit
<input type="checkbox"/>	<input type="checkbox"/>	Education Expenses - Tuition fees

**ITEMIZED DEDUCTIONS**

**Medical:**                      Health Insurance, LTC

Tax return has been signed by

		Medical Miles
		Prescriptions
		Lodging
		<b>Taxes:</b> Real Estate
		Sales Taxes
		State Taxes, Car Registration
		Mortgage Interest Paid and/or points
		Charity
		Tax Preparation Fee
		Casualty Losses
		Legal Fee Associated with Income

Questionnaire has been filled signed by the taxpayer

All documents have been scanned

Copy of return provided

Banking information verified

6 Form 8879 signed by

taxpayer Preparer's Signature:


**ILL OUT)**

<b>Forms</b>	<b>Number</b>	<b>Initial</b>	
W-2			Wage and Tax, Statement
W-2G			Certain Gambling Winning
K-1			Partner's Share of Income, deductions, Credit, etc.
1095-A			Health Insurance Marketplace statement
1095-B			Health Coverage
1095-C			Employer-Provided Health Insurance Offer and Cove
1098			Mortgage Interest Statement
1098-T			Tuition Statement
1099-A			Acquisition or Abandonment of Secured Property
1099-B			Proceeds from Broker and Barter Exchange Transacti
1099-C			Cancellation of Debt
1099-DIV			Dividends and Distribution
1099-G			Certain Government Payments
1099-INT			Interest Income
1099-MISC			Miscellaneous Income
1099-R			Distributions from Pensions, annuities, retirement o
1099-S			Proceeds from Real estate transactions
1099-SA			Distributions from an HAS, Archer MSA, or Medicare
1099-SSA			Social Security Income
1099-NEC			Nonemployee Compensation
Form 1040-ES			Estimated Tax for Individual
F-5695			<u>Energy Efficient Home Credit</u>
F-8910			<u>Alternative Motor Vehicle Credit</u>
F-1098 T			Tuition Statement

by the preparer



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r Profit-Sharing Plans, IRAs, Insurance Contract, etc.

Advantage MSA