

Please fill out the form completely and bring along with all tax documents, W2s, 1099s, SSA, Profit/Loss, IDs, SS# cards, IRS Letters, etc.

YEAR	FILLING STATUS				INSURANCE		3 RD STIMULUS	ADVANCED CTC			
	SINGLE	HOH	MFJ	MFS	YES	NO					
ADDRESS				CITY, STATE, ZIP CODE				LIVED HERE 6+ MONTHS			
								YES	NO		
PERSONAL INFORMATION											
FIRST NAME		M.I.	LAST NAME			SS# / ITIN					
TEL		EMAIL			DATE OF BIRTH						
OCCUPATION	UNEMPLOYMENT		TYPE OF INCOMES								
	YES	NO	W2	1099-NEC	1099R	SSA	K1	DIV	CRYPTO		
SPOUSE'S INFORMATION											
FIRST NAME		M.I.	LAST NAME			SS# / ITIN					
TEL		EMAIL			DATE OF BIRTH						
OCCUPATION	UNEMPLOYMENT		TYPE OF INCOMES								
	YES	NO	W2	1099-NEC	1099R	SSA	K1	DIV	CRYPTO		
DEPENDENTS' INFORMATION											
FIRST NAME		M.I.	LAST NAME			SS# / ITIN					
RELATIONSHIP	LIVED WITH YOU IN THE US 6+ MONTHS		SCHOOL NAME (REQUIRE PROOF OF ENROLLMENT)			DATE OF BIRTH					
	YES	NO									
FIRST NAME		M.I.	LAST NAME			SS# / ITIN					
RELATIONSHIP	LIVED WITH YOU IN THE US 6+ MONTHS		SCHOOL NAME (REQUIRE PROOF OF ENROLLMENT)			DATE OF BIRTH					
	YES	NO									
FIRST NAME		M.I.	LAST NAME			SS# / ITIN					
RELATIONSHIP	LIVED WITH YOU IN THE US 6+ MONTHS		SCHOOL NAME (REQUIRE PROOF OF ENROLLMENT)			DATE OF BIRTH					
	YES	NO									
FIRST NAME		M.I.	LAST NAME			SS# / ITIN					
RELATIONSHIP	LIVED WITH YOU IN THE US 6+ MONTHS		SCHOOL NAME (REQUIRE PROOF OF ENROLLMENT)			DATE OF BIRTH					
	YES	NO									
INCOME AND DEDUCTIONS											
INCOME	YES	NO	DEDUCTIONS			YES	NO	HOMEOWNERS		YES	NO
RENTAL INCOME			CHILD CARE					MORTGAGE INTEREST			
ALIMONY (DIVORCE PRE-2018)			DMV					PROPERTY TAX			
DISABILITY			DONATIONS					IMPROVEMENTS / CREDITS			
401K			UNIVERSITY (1098-T)					OTHER		YES	NO
GAMBLING / CASINO			STUDENT LOANS					\$10,000+ IN A FOREIGN BANK			
SALE OF STOCKS / CRYPTO			401K / IRA / RETIREMENT					SOLAR PANELS			
SALE OF PROPERTY			MEDICAL EXPENSES					ELECTRIC VEHICLE			
CREDIT CARD CHARGE-OFF'S			HOME OFFICE					PPP LOAN			
OTHER CASH INCOME			RENTAL EXPENSES					PPP LOAN FORGIVENESS			
ADDITIONAL QUESTIONS				YES	NO	ADDITIONAL QUESTIONS				YES	NO
DO YOU OWE THE IRS OR A STATE PRIOR YEAR TAXES						ARE YOU ON A PAYMENT PLAN					
CAN YOU BE CLAIMED AS A DEPENDENT OF SOMEONE ELSE						CAN SOMEONE ELSE CLAIM YOUR DEPENDENTS					
DO YOU HAVE VIRTUAL CURRENCY (BITCOIN, ETHEREUM, ETC)						DID YOU RECEIVE A REFUND LAST YEAR					
DO YOU HAVE A BANK ACCOUNT						ROUTING / ACCOUNT #					
DO YOU WANT TO PAY FROM YOUR REFUND						DO YOU HAVE COVERED CALIFORNIA (1095-A)					
DID YOU RECEIVED LETTERS FROM THE IRS						BANKRUPTCY					
I ATTEST THAT THE INFORMATION PROVIDED IS CORRECT AND AUTHORIZE THE PREPARATION OF THE TAX RETURN.											
SIGNATURE						DATE					