

Tax Year: 2023**Very Important > Answer each applicable item****Client Name:** _____ **Spouse Name:** _____☐ Married Filing Jointly ☐ Single ☐ Head of Household ☐ Married Filing Separately**Required:**

Email > Client _____ Spouse: _____

Cell phone > Client _____ Spouse: _____

Driver license > ☐ Client copy included ☐ Spouse copy included (State, Number, Issue and Expiration date)Tax return copies sent > ☐ 2022 ☐ 2021 (*One year mandatory*) IRS Identity-theft PIN > ☐ Letter(s)☐ Okay for IRS to discuss processing of return with preparer (*lasts for one year, until 4/15/2025*)☐ **Email via secure portal** ☐ **Mail to client** (Postage applies)☐ **Estimated tax PAID** > ☐ Payment records attached**E-Filing: PIN signature:** ☐ First 5 digits of SSN OK? If **No**, then: Taxpayer _____ Spouse _____**Bank account:** ☐ Checking ☐ Savings ☐ Copy of voided check ☐ Use same account for Fed/state**Routing number:** _____ **Account number:** _____**Refund:** ☐ Direct deposit ☐ Check ☐ Apply **Due:** ☐ Direct debit ☐ IRS Pay ☐ Check ☐ EFTPS**Other income?** ☐ No ☐ Yes \$ _____ (*documentation*) _____**Cryptocurrency?** ☐ No ☐ Yes **Foreign bank acct?** ☐ No ☐ Yes _____☐ Child with: ☐ Earned; ☐ Unearned income Amount \$ _____☐ Unemployment compensation \$ _____ State: _____ (include Form 1099-G)☐ **Standard Deduction** MFJ - \$27,700; Single - \$13,850; HOH - \$20,800; > 65 +\$1,500/\$1,850**Itemized Deductions** ☐ Form 1098 ☐ Property tax (paid in 2023) ☐ Charitable contributions☐ Sales tax ☐ State Income Tax ☐ Casualty in declared disaster area☐ Medical expenses ☐ Summary documentation includedCredits/Other☐ Home office: ☐ Regular and exclusive use Sq footage _____ Total home sq ft _____☐ EITC/CTC/ODC Any additional tax credits? ☐ Residential ☐ Vehicle _____☐ College: AOTC/LLC ☐ Form 1098-T plus ☐ List of college expenses (Excel) \$ _____For **Traders in Securities** > ☐ Trading expensesFor **Mark-to-Market Traders** > ☐ MTM Election included ☐ Making MTM Election for 2024Trading entity exists: ☐ Yes ☐ No; Beneficial Ownership Information Reporting required

Additional information: _____

