

TAXPAYER BASIC INFORMATION FORM

ABOUT YOUR TAXES

Are your taxes up to date? Yes No

If no, when was the last year you filed? _____

Did you file your taxes with us last year? Yes No

Which forms did you use? (If applicable) Short Long Business Rental(s) Stocks

Filing status Single Married Filing Jointly Married Filing Separately Head of Household Widowed

ABOUT YOU AND YOUR FAMILY

If no, when was the last year you filed? _____

Your full name _____

Your DOB _____

Your SS# _____

Your phone number _____

Your email _____

Your full address _____

Spouse name _____

Spouse DOB _____

Spouse SS# _____

Dependents? Name, DOB, SS# (One per line please)

SHORT FORM QUESTIONS

What city and State should we file your taxes in?

Did everyone in your family have health insurance last year? [] Yes [] No

Did you/your spouse or anyone on the return receive a 1095A for having insurance thru the ACA (Affordable Care Act)? [] Yes [] No

Were you notified by the IRS that you are required to complete a "certification" for the Earned Income Credit? (EIC) [] Yes [] No

Did everyone on the return have health insurance last year? [] Yes [] No

Could any other person claim your children this tax year? [] Yes [] No

Day Care? [] Yes [] No

For who? (If checked "yes")

Education Credit/Tuition Form? (Please include copy of forms) [] Yes [] No

LONG FORM QUESTIONS

Mortgage Interest? (Please include copy of forms) [] Yes [] No

Real Estate Taxes? (Please include copy of forms – statements/tax bills) [] Yes [] No

Charity Donations? (Please include copy of forms) [] Yes [] No

Other deductions?

(SEE NEXT PAGE FOR IDENTITY VERIFICATION)

IDENTITY VERIFICATION (REQUIRED)

Driver's License or State Id Information

Required for electronic filing, either complete the driver's license or state id detail information below **or** select the appropriate box for taxpayer and spouse to indicate why driver's license or state id information is no present.

Note: Providing identification numbers helps the IRS and states verify taxpayer identity which can prevent unnecessary delays in tax return processing.

TAXPAYER'S DRIVER'S LICENSE DETAIL

Issuing State _____

Identification Number _____

Issue Date _____

Expiration Date _____

NY Document Number* _____

* The NY document number is the 8 or 10 digit number at the bottom of the NY license (or NY state ID) or on the back if it was issued after January 28, 2014.

SPOUSE DRIVER'S LICENSE DETAIL

Issuing State _____

Identification Number _____

Issue Date _____

Expiration Date _____

NY Document Number* _____

* The NY document number is the 8 or 10 digit number at the bottom of the NY license (or NY state ID) or on the back if it was issued after January 28, 2014.

TAXPAYER'S STATE IDENTIFICATION CARD DETAIL

Issuing State _____

Identification Number _____

Issue Date _____

Expiration Date _____

NY Document Number* _____

* The NY document number is the 8 or 10 digit number at the bottom of the NY license (or NY state ID) or on the back if it was issued after January 28, 2014.

SPOUSE STATE IDENTIFICATION CARD DETAIL

Issuing State _____

Identification Number _____

Issue Date _____

Expiration Date _____

NY Document Number* _____

* The NY document number is the 8 or 10 digit number at the bottom of the NY license (or NY state ID) or on the back if it was issued after January 28, 2014.