



## CLIENT FORM

Taxpayer Information					Spouse Information				
Full name:					Full name:				
Occupation:			Telephone:		Occupation:			Telephone:	
SSN:			DOB:		SSN:			DOB:	
Email:					Email:				
Citizen	Resident	ITIN	Other		Citizen	Resident	ITIN	Other	
Marital Status:									
Address:									

Questions	Taxpayer		Spouse	
	Yes	No	Yes	No
Do you have a valid Social Security number?				
Do you receive income from abroad?				
Were you married on December 31, 2023?				
Did you get divorced during 2023?				
If you answered yes to the previous question, can you provide your divorce decree?				
Do you have a separation agreement?				
If you answered yes to the previous question, can you provide a copy of the separation agreement?				
Did you live with your partner during the last 6 months of 2023?				
Did you provide more than 50% of your home care for all of your dependents such as rent, utility payments, mortgage interest, property taxes, insurance, food, etc.?				
<b>If you answered yes to the previous question, the IRS may ask you to provide documentation to support those expenses such as utility bills, rent bills, grocery bills, etc.</b>				
Did you receive any other sources of income besides wages?				
Are all dependents that are being claimed, U.S. citizens or U.S. residents?				
Are you or any of your dependents studying an undergraduate program?				
If you answered yes to the previous question, do you have a Form 1098T and/or qualified expense receipts?				
Did you receive alimony in 2023?				
Did you pay alimony in 2023?				

Dependent					
First Name	Last Name	Date of Birth	SSN	Relationship	Number of months lived in your custody in 2023



Independent Workers	Taxpayer		Spousal	
	Yes	No	Yes	No
Did you work as an independent contractor in 2023?				
Do you declare that you are reporting all income earned in 2023 for the preparation of this tax return?				
Do you have documents to back up that income?				
Do you declare that you are reporting all expenses incurred in your business for the preparation of this tax return?				
Do you have documents to back up all those expenses?				
Are you aware that you have to keep business accounts separate from your personal accounts?				
Do you have a business bank account?				
Can you provide bank statements for your business bank account?				
Do you have a record of the miles spent in your business?				
If you answered yes to the previous question, can you provide mileage logging?				
Is your business DBA registered?				
<b>Note: If requested by the IRS, you must have documentation showing evidence of the income and of the expenses related to your business.</b>				

Additional Remarks:

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

**I declare that all information provided for this tax return is complete, correct and true.**

Taxpayer Signature:

Date:

Spouse Signature: