

2024 Tax Intake Form



FILING STATUS

- Single Married Filing Joint
- Married Filing Separately
- Head of Household
- Qualifying Widower

ADDRESS

St Addr _____
City _____ St _____ Zip _____
County _____ School Code _____

TAXPAYER

IRS PIN# (if applicable) _____

Social Security Number _____

First _____ MI _____ Last _____

Email _____

Work Ph _____ Cell/Other _____

Date of Birth _____ Date of Death _____

Preferred Method of Contact Email Phone Text

Email _____

Yes No Legally Blind Yes No Dependent of Other

SPOUSE

IRS PIN# (if applicable) _____

Social Security Number _____

First _____ MI _____ Last _____

Email _____

Work Ph _____ Cell/Other _____

Date of Birth _____ Date of Death _____

Preferred Method of Contact Email Phone Text

Email _____

Yes No Legally Blind Yes No Dependent of Other

DEPENDENTS (INCLUDING NON-CHILD DEPENDENTS) (*NOTE: Student refers to tuition paying (college/private school) Use back of page, if necessary

First, Middle Initial, Last Name	Student?*	D.O.B.	Social Security #	Disabled?	Relationship	Months
_____	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____	_____
_____	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____	_____
_____	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____	_____

EMPLOYMENT & RETIREMENT INFORMATION

- Yes No - Are you employed? Occupation? _____
- Yes No - Are you contributing to a 401(k), 403(b), or other pre-tax account?
- Yes No - Have you ever opened any form of pre-tax account in the past?
- Yes No - Have you considered a ROTH conversion of pre-tax accounts?
- Yes No - Would you like a ROTH conversion tax "WHAT-IF" prepared with your return?

STATE & OTHER

- Yes No - Are you requesting state return(s)? If yes, what state(s): _____
- Yes No - Any energy efficient home improvements this year? Please Specify: _____

E-FILE / FILING INFO Check ONE: Original Return Amended return

1. How do you want any refund sent to you? **MUST CHECK ONE**

Direct Deposit (few days) Routing #: _____ Acct #: _____

Checking Savings Name of Bank: _____

Applied to next year's return

Paper check by mail (could take several weeks)

Any **taxes due** may be paid by check or online along with voucher provided by tax preparer or with extension form. *It is the taxpayer's responsibility to make payments before April due date. Filing an extension does NOT extend time to pay.