

Client and Tax Information: Tax Year 2023

It is important to provide any changes from last year on this form.

Client Information (required):		
Taxpayer Name:	Name of Spouse:	
Social Security Number:	Social Security Number:	
Birthdate:	Birthdate:	
Occupation:	Occupation:	
Email:	Email:	
Cell Phone <i>(we use as primary contact):</i>	Cell Phone <i>(we use as secondary contact):</i>	
Work Phone:	Work Phone:	
Home Phone:	Home Address:	
Dependent Information:		
Name of Dependent	Social Security Number	Date of Birth
- Child Care:		
Provider Name:	Address:	
Social Security Number or FEIN if they have one:	Amount Paid (annually):	
Provider Name:	Address:	
Social Security Number:	Amount Paid (annually):	
- Tuition and Related Expenses:		
For any household member incurring tuition and related expenses, submit Form 1098-T – Tuition Statement in addition to a summary of expenses paid for books, supplies, and equipment for post-secondary education.		
Name of Student	Year in College (indicate 1 2 3 4)	Tuition (annual)

Health Insurance:

Do you have health insurance: Yes No

Please attach FORM 1095 that you received regarding your health insurance policy.

Charitable Donations (list below):

Charitable donations – cash:

Charitable donations – non-cash:

Itemized Deductions:

- Contributions:

Non-cash contributions:

- Medical:

Medical insurance premiums:	Medicine and prescription drug expenses:
Hospital and clinic expenses:	Dental expenses:
Optician and eyeglass expenses:	All other medical expenses:
Miles driven to obtain medical care (annually):	

- Taxes:

Sales tax on vehicles (cars, motorcycles, etc.):	State income tax:
Real estate taxes:	

- Home Mortgage Interest:

Amount:

IRA:

Did you make contribution(s) to an IRA: Yes No If “yes”, please complete those areas that apply.

Taxpayer:	Spouse:
Roth IRA amount:	Roth IRA amount:
Traditional IRA amount:	Traditional IRA amount:
SEP, Keogh, or SIMPLE amount:	SEP, Keogh, or SIMPLE amount:

Tax Estimates for 2023: Did you make any: No Yes (if “yes”, complete below)

	Federal	State
April		
June		
September		
December 31 (made BEFORE 12/31/2023)		
January (made AFTER 12/31/2023)		

FORM 1099-K

Did you receive payments through any payment apps: Yes No

If “yes”, provide us with all 1099-K forms you have received. Be sure to note those that you received as reimbursement from a friend or family member, as those amounts are not taxable.

Income other than W-2’s, which you have provided us:

Please submit any other forms which show income amounts.