

# WELCOME

To better serve you and meet your tax preparation expectations, we ask that you take a few minutes to fill out the information below. If you have any questions while completing this form, please do not hesitate to ask.

**1** Fill out this form to the best of your knowledge, and review and sign the legal documents.

**2** You can choose to leave this form and your tax documents with the Client Service Professional at the front desk or you can choose to have a 10-15 minute meeting with your tax professional.

**3** After your tax return is ready, you can come back in to the office to complete it, or choose our Approve Online option to finish your return online.

Are you a returning Client?  Y |  N

What date would you like for your return to be ready? (typical turnaround is 3 days): \_\_\_\_\_

**CLIENT INFORMATION:**

Primary Taxpayer Name: \_\_\_\_\_

Spouse Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Spouse Date of Birth: \_\_\_\_\_

SSN or ITIN: \_\_\_\_\_

Spouse SSN or ITIN: \_\_\_\_\_

Marital Status:  Single |  Married |  Widowed

Occupation: \_\_\_\_\_

Occupation: \_\_\_\_\_

Address (If different): \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Best Phone Number: \_\_\_\_\_

Preferred Contact Method:  Email |  Phone

Email: \_\_\_\_\_

Best Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_

Can you be claimed as a dependent by someone else?  Y |  N

Are you an active member or the spouse/dependent of an active member of the military?  Y |  N

**DEPENDENTS \*** (or person living in your household)

Name	Relationship	Date of Birth	SSN or ITIN	Full Time Student	Disabled?

\*If any dependents listed did not live at the primary taxpayers address the entire year, please discuss this with your tax professional. This is critical to help us help you accurately report your residency and dependency to the tax authorities.

**INCOME:**

(Check all that apply &amp; include documents.)

- Employer (W-2)
- Self-Employment\*
- Interest (1099-Int)
- Social Security/Retirement
- Dividends (1099-Div)
- Rental Property\*
- Stock or Mutual Fund sale (1099-B)
- Unemployment

**EXPENSES :**

(Check all that apply &amp; include documents.)

- Self Employment\*
- Un-reimbursed by your employer
- Education
- Rental Property\*
- Medical/Dental care
- Union Dues

**CREDIT & DEDUCTIONS:**

(Check all that apply &amp; include documents.)

- Donate cash or goods to a charity?
- Pay Student Loan interest?
- Pay Child/Dependent Care expense?
- Have a Mortgage Payment? (1098)
- Make an IRA Contribution?
- Make a major taxable purchase?
- Pay Property Taxes?

**HEALTH INSURANCE**

(Check all that apply &amp; include documents.)

Were you or any members of your household:

- Covered by a qualified private or government health insurance plan?
- Enrolled in a health insurance plan through the federal or state marketplace?

**MISCELLANEOUS\*:**

(Check all that apply.)

Did you or your spouse:

- Sell a home?
- Take an IRA or 401(k) distribution?
- Pay/Receive alimony?
- Adopt a child?
- Suffer catastrophic loss?
- Have gambling winnings/losses?

\* If this applies, we recommend you meet with your tax professional to discuss your tax situation before dropping off your information.

**TAX PROFESSIONAL OR CLIENTSERVICE PROFESSIONAL COMPLETE THE SECTION BELOW:**

## Legal Disclaimers

Client received Privacy Policy, Consent to Use and Consent to Disclose Service Provider documents, and the documents were explained and executed as applicable.  Y |  N

Did the client review and sign the Client Service Agreement?  Y |  N

## Follow Up

How would the client like to review and approve their tax return?

Freedom TBI Office – Appointment time and date: \_\_\_\_\_

Approve Online: Email id for e-signing: \_\_\_\_\_

Tax Pro: If Approve Online is selected, you must verify Taxpayer and Spouse (if applicable) Identification.

Taxpayer ID Type: \_\_\_\_\_ Exp. Date: \_\_\_\_\_ Spouse ID Type: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Place of Issuance, if any \_\_\_\_\_ Place of Issuance, if any \_\_\_\_\_

Date of Issuance, if any \_\_\_\_\_ Date of Issuance, if any \_\_\_\_\_