Client Intake Form

Helping You Keep More of What You Earn.

1) Personal Information

Full Name: Date of Birth: SSN (last 4):

Phone: Email:

Home Address:

City / State / ZIP:

2) Filing Information

Filing Status (check one):

- ☐ Single
- ☐ Married Filing Joint
- ☐ Married Filing Separate
- ☐ Head of Household
- ☐ Qualifying Widow(er)

Do you have dependents? ☐ Yes ☐ No

If yes, list names and ages:

3) Income Sources (check all that apply)

- ☐ W-2 Employment
- ☐ Self-Employment / 1099
- ☐ Gig Work (Uber, Spark, etc.)
- ☐ Unemployment Benefits
- ☐ Social Security / Retirement
- ☐ Other (rental, investments, etc.)

4) Required Documents (check all included)

- ☐ Valid Photo ID
- ☐ Social Security Cards
- ☐ W-2s / 1099s
- ☐ Expense Proof (receipts, mileage)
- ☐ Childcare Provider Info
- ☐ Bank Info for Direct Deposit

5) Signature

By signing below, I certify the information provided is true and complete to the best of my knowledge.

For Office Use Only

Preparation Fee: ____________ Refund / Balance Due: ____________

Payment Method: ■ Cash ■ Card ■ Bank Deposit

Date Filed: ____________ IRS/State Confirmation #: ____________

Notes / Comments: ______________________________