Were you a client LAST year? YES or NO If NO, please provide a copy of last year’s return. \_\_\_\_\_

Were you married as of December 31st?

YES: Filing JOINTLY or SEPARATELY NO: Filing SINGLE or HEAD-OF-HOUSEHOLD

Today’s Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ CELL Phone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Taxpayer Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Birth: \_\_\_\_-\_\_\_\_\_-\_\_\_\_

Did you update your driver’s license in the last year? \_\_\_\_\_ Social Security # \_\_\_\_\_\_-\_\_\_\_-\_\_\_\_\_\_\_\_

Spouse Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Birth: \_\_\_\_-\_\_\_\_\_-\_\_\_\_

Did you update your driver’s license in the last year? \_\_\_\_\_ Social Security # \_\_\_\_\_\_-\_\_\_\_-\_\_\_\_\_\_\_\_

Street Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ County \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Township\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

If you moved to Wisconsin during the last year, when did you move here? \_\_\_\_-\_\_\_\_\_-\_\_\_\_

When did you become a WI Resident? \_\_\_\_-\_\_\_\_\_-\_\_\_\_

Did you buy or sell a HOME or PROPERTY? YES or NO If YES, purchase/sale documentation is required.

Is anyone claiming you as a dependent on their return? YES or NO

Did you own/have interest in a business or own/operate a Farm? YES or NO

Did you make any online purchases for which you may owe WI state sales tax? YES or NO Amount Due \_\_\_\_\_

Did you own or rent any foreign properties? YES or NO

Did you have any money in foreign accounts? YES or NO

Did you receive, sell, send, exchange, acquire, or mine any virtual currency (cryptocurrency)? YES or NO

Are you currently a member of the US Military? YES or NO

**Housing**

Did you RENT or OWN your home?

RENT: How much did you pay per month last year? \_\_\_\_\_\_\_\_\_\_

Did you pay your own heating costs? YES or NO

*If you qualify for Homestead Credit, you will need a completed and signed Rent Certificate from your landlord.*

OWN: Please provide a property tax bill/statement. \_\_\_\_\_ Form 1098 \_\_\_\_\_

**Dependents**

Are you claiming dependents? YES or NO If YES, please complete Diligence Worksheet \_\_\_\_\_

Did you receive Advance Child Tax Credit payments? YES or NO Letter 6419 \_\_\_\_\_

Did you pay Daycare Expenses? YES or NO Documentation \_\_\_\_\_

New Client or Added Dependents: Birth Certificates \_\_\_\_\_ Copies of Social Security Cards \_\_\_\_\_

**Health Insurance**

Did you acquire health insurance from the Marketplace, commonly known as “ObamaCare”? YES or NO

Form 1095-A \_\_\_\_\_

Did you pay significant health-related costs out of pocket? YES or NO

Did you pay for supplemental health insurance? YES or NO

**Other things to consider (Documentation Required)**

Did you receive the third stimulus payment (EIP-3)? YES or NO Amount \_\_\_\_\_\_\_\_\_\_

Notice 1444-C \_\_\_\_\_ Letter 6475 \_\_\_\_\_

Did you take a withdrawal/distribution from a Retirement Plan or 401(k)? YES or NO

If yes, date? \_\_\_\_-\_\_\_\_\_-\_\_\_\_ Amount? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Did you have Jury Duty? YES or NO Check Stub \_\_\_\_\_

Did you receive Unemployment? YES or NO Form 1099-G \_\_\_\_\_

Did you receive “Forgiveness of Debt” from a Creditor? YES or NO Form 1099-C \_\_\_\_\_

Did you have any gambling winnings? YES or NO Form W-2G \_\_\_\_\_

Did you sell any stocks? YES or NO Form 1099-B \_\_\_\_\_

Did you receive Social Security benefits? YES or NO Form 1099-SA \_\_\_\_\_

Did you receive retirement benefits? YES or NO Form 1099-R \_\_\_\_\_

Did you have Student Loans? YES or NO Form 1098-E \_\_\_\_\_

Did you pay tuition for higher education? YES or NO Form 1098-T \_\_\_\_\_

Did you receive non-taxable Veteran’s benefits or other non-taxable benefits? YES or NO

Has your direct deposit information changed since last year? YES or NO

If it has changed, for direct deposit of refunds, what is your banking information? CHECKING or SAVINGS

Bank Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Routing #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Account #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Would you like to receive your return on a USB flash drive? YES or NO

If YES, should we upload your documents to the flash drive and shred the originals? YES or NO

**When your return is complete, our office will call to schedule an appointment for you to sign and pick up your tax return documents. For those who are Married Filing Jointly, both spouses must sign the return.**