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| --- | --- | --- | --- | --- | --- |
| ***Please collect the following information (when applicable) and include with your hard copy tax documents.*** | |  | | | *For questions, call*  920-563-6562  *or email*  recpt@forttaxservice.com |
| **ALL CLIENTS** | | | | | |
|  | Name | |  | \* Copy of driver’s license *(taxpayer and spouse, if applicable)* | |
|  | **CURRENT** address | |  | Dependents *(if applicable)* | |
|  | Email | |  | Primary Phone Number | |
|  | Newly Married or Divorced in 2022, provide date | |  |  | |
| **NEW CLIENTS** | | | | | |
|  | \* Copy of social security cards for *EVERYONE (including dependents)* listed on tax return | |  | Date of birth for EVERYONE *(including dependents)* listed on tax return | |
|  | \* Copy of last two year’s tax returns | |  | \* Copy of driver’s license *(taxpayer and spouse, if applicable)* | |
| **NEW FOR 2023** | | | | | |
| * Do you have an LLC? Remember to file an initial beneficial ownership info at https://www.fincen.gov/contact * Energy Efficient Home Improvements | | | | | |
| **INCOME & DEDUCTIONS** | | | | | |
|  | \* W2’s from all employers | |  | \* Charitable contributions and cash donations | |
|  | \* 1099 forms -Unemployment 1099 G, 1099 INT, 1099 DIV, 1099 B, HSA 1099 SA, 1099 Brokerage Statement | |  | Medical expenses (including mileage) | |
|  | Health insurance premiums (paid out of pocket) | |  | Social security statements | |
| **IF YOU OWN A PERSONAL RESIDENCE** | | | | | |
|  | \* Mortgage interest (Form 1098) | |  | \* Real estate taxes paid | |
|  | \* Closing documents if you bought, sold or refinanced a home | |  |  | |
| **IF YOU OWN RENTAL PROPERTY (not typical)** | | | | | |
|  | Rental income | |  | Insurance premiums | |
|  | Repairs & Maintenance | |  | Real estate taxes paid | |
|  | Mileage for repairs, inspections, etc. | |  | Loan/Mortgage interest | |
| **IF YOU OWN A BUSINESS OR FARM (not typical)** | | | | | |
|  | Tax ID #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |  | 12/31/23 bank balances | |
|  | List of capital assets and equipment *(date purchased & sold)* | |  | Business use of home info, if applicable | |
|  | Business income and expenses | |  | Mileage log | |
| **OTHER (some areas not typical)** | | | | | |
|  | Do you rent? How much? \_\_\_\_\_\_\_ Is heat included? Y or N | |  | Did you purchase or sell any virtual currency | |
|  | Did you make any IRA contributions? How much? \_\_\_\_\_\_ | |  | Sales tax from vehicle purchase | |
|  | \* Educational expenses (1098-T) loan interest, tuition, private school tuition, and supplies | |  | \* Marketplace Health Insurance (1095-A) (1095B or 1095 C forms are not needed) | |
|  | \* Cancellation of Debt (1098-C) | |  | Long-term care premiums | |
|  | \* Gambling Income | |  | Hobby income | |
|  | Banking Info: If you are getting a refund, how would you like to receive it:  MAILED CHECK or DIRECT DEPOSIT *(savings or checking)* | |  | \*  Jury Duty | |
|  | Child Care Expense and address (with Tax ID # or SSN of caregiver) | |  | Estimated tax payments. How much paid and the date | |
|  | Alimony paid or received | |  | Check, Cash, Debit or Charge are acceptable options for payment.  Or, taken from your refund *(for an additional fee)*? | |
|  |  | |  | How would you like your tax return?  PAPER COPY or PORTAL (PDF) COPY | |

*\* Hard copy forms are required, if applicable to you (portal copies are acceptable as hard copies)*