

Jeffrey Plante Bookkeeping and Tax Service

Tax Preparation Client Intake Form

Thank you for choosing Jeffrey Plante Bookkeeping and Tax Service for your tax preparation needs. Please complete this form and provide the necessary documents to ensure accurate and timely filing of your tax return. There is also a section for any additional information that you wish to provide., e.g. additional dependents.

Client Information

- **Full Name:** _____
 - **Spouse's Full Name (if filing jointly):** _____
 - **Mailing Address:** _____
 - **City, State, ZIP:** _____
 - **Phone Number:** _____
 - **Email Address:** _____
 - **Social Security Number (SSN):** _____
 - **Spouse's SSN (if applicable):** _____
 - **Date of Birth:** _____
 - **Spouse's Date of Birth:** _____
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Tax Filing Status (Check One):

- ☐ Single
 - ☐ Married Filing Jointly
 - ☐ Married Filing Separately
 - ☐ Head of Household
 - ☐ Qualifying Widow(er)
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Dependents(if applicable)

Name	Date of Birth	SSN	Relationship

Income Documents (Provide All That Apply):

- ☐ W-2 (Wage and Tax Statement)
 - ☐ 1099-NEC (Non-Employee Compensation)
 - ☐ 1099-MISC (Miscellaneous Income)
 - ☐ 1099-K (Third Party Payment Transactions)
 - ☐ 1099-INT (Interest Income)
 - ☐ 1099-DIV (Dividend Income)
 - ☐ 1099-G (Unemployment Compensation)
 - ☐ 1099-R (Retirement Distributions)
 - ☐ SSA-1099 (Social Security Benefits)
 - ☐ K-1 (Partnership, S-Corp, or Trust Income)
 - ☐ Other Income: _____
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Self-Employed / Business Income

If you have business income, please provide:

- ☐ Profit and Loss Statement OR a list of income and expenses
- ☐ 1099s received for business income
- ☐ Business use of home expenses (if applicable)
- ☐ Vehicle mileage log (if applicable)
- ☐ Travel, Dining & Entertainment
- ☐ Subscriptions & Services Paid
- ☐ Inventory Purchases, Other product expenses
- ☐ Marketing, Advertising or other selling expenses
- ☐ Labor, employee wages or other employment expenses
- ☐ Supplies, office expenses, utilities, repairs & maintenance
- ☐ Rent, insurance, taxes and any other deductible business expenses

Deductions & Credits (Provide Documentation for Any That Apply):

- ☐ Student Loan Interest (Form 1098-E)
- ☐ Tuition & Education Expenses (Form 1098-T)
- ☐ Mortgage Interest Statement (Form 1098)
- ☐ Property Tax Bills
- ☐ DMV Registration
- ☐ Charitable Contributions
- ☐ Medical & Dental Expenses
- ☐ IRA / Retirement Contributions
- ☐ Childcare Expenses (Provider Name, EIN, and Amount Paid)
- ☐ Health Insurance (1095-A, 1095-B, or 1095-C)
- ☐ Other misc. deductions
- ☐ State & Local Taxes Paid

Other Documents

- ☐ Last Year's Tax Return (New Clients Only)
- ☐ Direct Deposit Information (If Expecting a Refund)

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- ☐ Any IRS or State Tax Correspondence Received

Would You Like to Discuss Tax Planning for Next Year?

- ☐ Yes ☐ No

Acknowledgment & Signature

I acknowledge that the information provided above is accurate to the best of my knowledge. I understand that any omitted or incorrect information may affect the accuracy of my tax return.

Signature: _____

Date: _____

Additional Information: