

Akron Income Tax Co.

TAXPAYER INFORMATION FORM

Did you file your taxes with us last year? YES NO

Did you have any virtual currency (i.e.: Bitcoin type) transactions this year? YES NO

Short Form [] Long Form [] Business [] Rental(s) [] Stocks []

General Questions-----

		<u>Filing Status</u>
Name _____	DOB <u> / / </u>	MARRIED/Do it the best way! []
Driver License # _____	Issue Date <u> / / </u>	MARRIED/JOINT []
	Expire Date <u> / / </u>	MARRIED/SEPARATE []
Spouse _____	DOB <u> / / </u>	HEAD OF HOUSEHOLD []
Driver License # _____	Issue Date <u> / / </u>	SINGLE []
	Expire Date <u> / / </u>	PARENTS CLAIM ME (student) []

Ssame as last year? check box [] and you can skip address/city/st/zip questions

Current Address _____
City/State/Zip _____

Contact Phone _____ EMAIL Address _____

What "City" if any, should we file for your local tax return? _____

Dependents -----

	DEPENDENTS	LAST NAME	Birth	Age On	Mths in	SS##
	FIRST NAME	<i><u>IF DIFFERENT</u></i>	Date	12/31 last yr	home	
<div style="border: 1px solid black; padding: 5px; width: fit-content;"> ALL CLIENTS First Name of Each Dependents Please </div>	_____	_____	<u> / / </u>	_____	_____	____-____-____
	_____	_____	<u> / / </u>	_____	_____	____-____-____
	_____	_____	<u> / / </u>	_____	_____	____-____-____
	_____	_____	<u> / / </u>	_____	_____	____-____-____

Yes No Did you receive the extra monthly (\$300) "Child Tax Credit" amount last year?

Tax Form Questions-----

Yes No Did you receive a 1095 A form for your Affordable Care Act insurance?
===Please Include 1095A Form if you received it===

Yes No Were you notified by the IRS that you are required to complete a "Certification" for the Earned Income Credit? (EIC)

Yes No Could any other person claim your children this tax year?

Yes No Day Care? Form Enclosed? Whom to? Address? SS#? Amount?

Yes No Education Credit/Tuition Form Enclosed? What year of school? 1 2 3 4 5+

Yes No Charity Donations Must have Proof Total \$ _____

Long Form Only Questions-----

Yes No Mortgage Interest Form Enclosed?

Yes No Real estate taxes Form Enclosed? (Mortgage statement/tax bills)

Other Notes
