INDIVIDUAL TAX RETURN

Personal and Dependent Information

Preferred Tax Preparer: ______________________ **Date:**_______________

Tax Year: ______________ **Inv#** ______________

	NAME	SSN	DATE OF BIRTH	OCCUPATION
Taxpayer				
Spouse				

	DAYTIME PHONE	HOME/CELL PHONE	DRIVERS LICENSE #	ISSUE DATE	EXPIRE DATE	STATE
Taxpayer						
Spouse						

Taxpayer Email: Spouse Email:

Street Address ____

City ________________________________ State: ______________ Zip: ________________

Marital Status at Tax Year End

☐ Married Filing Joint
☐ Married Filing Separate
☐ Single
☐ Head of Household (single with Child)
☐ Widow(er), Date of Spouse's Death __________

CHECK ALL THAT APPLY	Taxpayer	Spouse
Blind		
Disabled		
Full Time Student		
Want $3 to go to Presidental Election Campaign Fund	YES	NO

Dependent Information

	NAME	SSN	DATE OF BIRTH	RELATIONSHIP	MTHS IN HOME
Dependent #01					
Dependent #02					
Dependent #03					
Dependent #04					

Other Information to bring to Precision Accounting for your Tax Return

☐ Client Information Sheet	☐ Letters Received from IRS or State	☐ Copy of Prior Year Tax Return, New Clients only
☐ ID for Taxpayer & Spouse including SS Cards for all listed on Return	☐ 1098 for Mortgage Interest with Property Taxes paid on home, land, vehicles	☐ Proof of Child Dependency-Earned Income Tax Credit (School &/or Medical Records,DayCare, Etc.
☐ W-2 for Wages	☐ 1099-R for Retirement	☐ Health Insurance For ms 1095-A, B or C
☐ W-2G for Gambling	☐ 1099-G for Refunds & Unemployment	☐ 1099-B Brokerage Accounts
☐ 1099-Int for Interest Earned	☐ 1099-K for Estate and/or Business Income	☐ IRS Letter 6419 for Advance Child Care Credit
☐ 1099-Div for Dividends Earned	☐ 1098-T for Tuition Paid	☐ College out of pocket expense for student attending college beyond high school
☐ SSA-1099 for Social Security	☐ Form 1444-C for Stimulus Payment	☐ Property Sold, Copy of Purchase & Sale closing Papers
☐ 1099-MISC for Other Income	☐ Rental Property Income & Expenses	☐ IRS Letter 6419 for Advance Child Credit [1]
☐ 1099-NEC for Contract Work	☐ Self-Employed Income & Expenses	☐ Charitable Donations [2]

1. If this amount is reported incorrectly, it could result in tax owed back to IRS.

2. Deductions for charity, so please let us know of all cash donations made in 2021.

Signature of Taxpayer: ____

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Account Information for Deposits or Withdrawals						
Name of Bank	**Bank Routing Number**	**Bank Account Number**	**Type of Account**		**Use Account for**	
			Checking	**Savings**	**Deposits**	**Withdrawals**

ESTIMATES	**Federal**		**Resident State**	
	Date Paid	**Amount**	**Date Paid**	**Amount**
Overpayment applied from 2019				
First Quarter				
Second Quarter				
Third Quarter				
Fourth Quarter				
Additional Payments				

Stimulus Checks Received	
Date (approx)	**Amount**

Child Tax Credit	
Date (approx)	**Amount**

☐ Have Foreign Bank Account/Savings Account
Amount in Account(s) ___________________

☐ Have Virtual Currency
☐ Purchased ☐ Sold ☐ Exchanged
NOTE: Will need details of transactions