



REQUIRED:

SOCIAL SECURITY CARDS or **Individual Tax Identification Number** (ITIN) letter. (For **ALL** individuals listed on the return - includes client, spouse and dependents).

PHOTO ID (license, passport, Resident Alien Card, ID from the registry, etc.). - If filing jointly **BOTH** taxpayer and spouse must provide ID.

Intake Form (Form 13614-C)

Virtual Consent Form (Form 14446)

INCOME: (Please bring all that apply)

- Wages or Salary - (Form W-2)
- Tip Income
- Scholarships - (Forms W-2, 1098-T)
- Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage - (Forms 1099-INT, 1099-DIV)
- Refund of state/local income taxes - (Form 1099-G)
- Alimony income or separate maintenance payments
- Self-Employment income - (Form 1099-MISC, cash)
- Cash/check payments for any work performed not reported on Forms W-2 or 1099
- Income (or loss) from the sale of Stocks, Bonds or Real Estate (including your home) - (Forms 1099-S, 1099-B)
- Disability income - (such as payments from insurance, or workers compensation)- (Forms 1099-R, W-2)
- Retirement income or payments from Pensions, Annuities, and or IRA - (Form 1099-R)
- Unemployment Compensation - (Form 1099G)
- Social Security or Railroad Retirement Benefits - (Forms SSA-1099, RRB-1099)
- Income (or loss) from Rental Property
- Other income - (gambling, lottery, prizes, awards, jury duty, Schedule K-1, royalties, foreign income, etc.) (Please Specify)

EXPENSES: (Please bring all that apply)

- Alimony or separate maintenance payments - If yes, do you have the recipient's SSN?
- Contributions to a retirement account - IRA, 401K, Roth IRA, Other
- College or post-secondary educational expenses for yourself, spouse or dependents - (Form 1098-T)
- Deductions – Medical & Dental (Has to be 7.5% of AGI) Mortgage Interest (Form 1098) Taxes (State, Real Estate, Personal Property, Sales) Charitable Contributions
- Child or dependent care expenses such as daycare – (Providers Name, Address & Tax ID Number)
- Educator/ Teacher Expenses – (ex. Classroom supplies, books, etc...)
- Expenses related to self-employment income or any other income you received
- Student loan interest - (Form 1098-E)

LIFE EVENTS: (Please bring all that apply)

- Health Savings Account (HAS) - (Forms 5498-SA, 1099-SA, W-2 with code W in box 12)
- Credit card or Mortgage debt cancelled/forgiven by a lender or have a home foreclosure - (Forms 1099-C, 1099-A)
- Child Adoption
- Earned Income Credit, Child Tax Credit or American Opportunity Credit **disallowed in a prior year** - If yes, for which tax year?
- Purchased and installed energy-efficient home items - (such as windows, furnace, insulation, etc.)
- Live in an area that was declared a Federal disaster area - If yes, where?
- Received the First Time Homebuyers Credit in 2008
- Made estimated tax payments or apply last year's refund to this year's tax? If so how much?
- File a federal return last year containing a "capital loss carryover" on Form 1040 Schedule D
- Received a letter from the IRS – (Might require a PIN to e-file)

HEALTHCARE COVERAGE: (Please bring all that apply)

- Marketplace Exchange Insurance (Health Connector) – (Form 1095-A)
- (a). If Applicable, were advance credit payments made to help pay health care premiums?
- (b). If yes, is everyone listed on Form 1095-A being claimed on this tax return?
- Health Insurance Coverage – (Form 1099 HC or Form 1095-B) OR
- Health Insurance Name: _____ ID Number: _____
- Months Covered (Client): JAN – FEB – MAR – APR – MAY – JUN – JUL – AUG – SEPT – OCT – NOV – DEC
- Months Covered (Spouse if MFJ): JAN – FEB – MAR – APR – MAY – JUN – JUL – AUG – SEPT – OCT – NOV – DEC
- Marketplace Certificate – (If Approved for Healthcare Coverage Exemption)
- **2022 Monthly Rent:** _____

For Direct Deposit:

- **Bank Name - Bank Routing/ABA - Account #** - (Please state if the account is a **Checking** or **Savings** account) (If possible please include a copy of a voided check or savings account card provided by your financial institution)

NOTE: **Only Copies** of documentation will be accepted – Please **Do Not** include any originals
Drop off at 17 Kirk St., Lowell MA 01852
Saturday's 9 AM and 12 PM

165 Merrimack St
Lowell MA 01852
978-735-6748