

## Personal Tax Return Intake Form

### Client Information

- Full Name: \_\_\_\_\_
  - Social Security Number (SSN): \_\_\_\_\_
  - Date of Birth: \_\_\_\_\_
  - Address: \_\_\_\_\_
  - Phone Number: \_\_\_\_\_
  - Email: \_\_\_\_\_
  - Marital Status (Single / Married / Head of Household / Other): \_\_\_\_\_
  - Filing Status for this year: \_\_\_\_\_
  - Dependents (Name, SSN, Relationship, Date of Birth):
    1. \_\_\_\_\_
    2. \_\_\_\_\_
    3. \_\_\_\_\_
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### Income Information

Please attach all applicable documents.

- W-2 Forms (Wages):  Yes  N/A
  - 1099-MISC / 1099-NEC (Self-Employment, Freelance):  Yes  N/A
  - 1099-INT / 1099-DIV (Interest / Dividends):  Yes  N/A
  - 1099-B (Stock Sales / Investments):  Yes  N/A
  - 1099-R / SSA-1099 (Retirement / Social Security):  Yes  N/A
  - Rental Income:  Yes  N/A
  - Other Income (Unemployment, Alimony, etc.):  Yes  N/A
  - Cryptocurrency Transactions:  Yes  N/A
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### Deductions & Expenses

Attach receipts or statements when applicable.

- Mortgage Interest Statement (Form 1098):  Yes  N/A
- Property Taxes Paid:  Yes  N/A
- State and Local Taxes Paid:  Yes  N/A
- Charitable Contributions:  Yes  N/A
- Medical Expenses:  Yes  N/A
- Education Expenses (Form 1098-T / 1098-E):  Yes  N/A
- Childcare Expenses:  Yes  N/A
- Business Expenses / Home Office:  Yes  N/A

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**Other Information**

- Health Insurance Coverage (Form 1095-A/B/C):  Yes  N/A
- Estimated Tax Payments Made:  Yes  N/A
- Prior Year Tax Return:  Yes  N/A
  
- Bank Account Information for Direct Deposit:

Routing \_\_\_\_\_

Account # \_\_\_\_\_

- Yes  N/A
  - Any Notices from IRS / State:  Yes  N/A
  - Additional Comments / Special Situations:
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**Authorization**

I hereby authorize MC Taxes & Accounting to prepare my tax return using the information provided. I attest that all information is accurate to the best of my knowledge.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_