

Client Intake Data Sheet—Tax Year 2023

As paid tax preparers, the IRS (Internal Revenue Service) and NYS require that we e-file all returns.

Name(s): _____

Cell Phone: _____

Home Phone: _____

Work Phone: _____

E-Mail (IMPORTANT: IF FILING JOINT, PLEASE PROVIDE BOTH TAXPAYER AND SPOUSE EMAILS)

Taxpayer Email: _____ Spouse Email: _____

Preferred Method and time for contact: _____

Please include a readable copy of the front and back of your Driver License or Non-Driver ID.

To assist in preparing your tax return, please answer the following questions:

- 1.) For Taxpayers taking Required Minimum Distributions from an IRA (Individual Retirement Account) or over 70 ½:

Did you make a Qualified Charitable Distribution (QCD) directly from your IRA? ☐ Yes ☐ No

If yes, please provide the amount of the QCD: \$ _____

- 2.) For NYS residents:

Did you receive a STAR Credit in the form of a check in 2023? ☐ Yes ☐ No

If yes, please provide the amount: \$ _____

- 3.) Did your marital status change during 2023? ☐ Yes ☐ No

If yes, please explain: _____

- 4.) Did you or your spouse receive any foreign income or have a foreign bank account(s) or foreign trust?

☐ Yes ☐ No

If yes, please provide details: _____

(NOTE: If you are required to file an FBAR, the filing deadline is April 15, 2024)

- 5.) ..I would like my **refund directly deposited** ☐ Yes ☐ No

- 6.) I would like my **tax payment directly withdrawn** from my bank account. ☐ Yes ☐ No

For 5 and 6 above, please attach a **VOIDED CHECK** (if checking acct) and indicate bank info below:

Bank Name _____ ☐ Checking ☐ Savings (select one)

Routing # _____ Account # _____

7.) Did you move or change your address in 2023 / 2024? ☐ Yes ☐ No

If yes, here is my new address: (Date of move outside or into New York State:)

8.) I (and/or my spouse) am/are/is a:

☐ Teacher ☐ Volunteer Firefighter/Ambulance ☐ Military

9.) Are you adding any new dependents for tax year 2023? ☐ Yes ☐ No

(Do not include your spouse)

If yes, list name, date of birth and social security number.

Name

Date of Birth

Social Security Number

10.) Are you removing any dependents for tax year 2023? ☐ Yes ☐ No

If yes, list name and reason.

Name

Reason

11.) Was your dependent (child/children) a full-time college student in 2023? ☐ Yes ☐ No

If yes, list name, year in college (1st, 2nd, 3rd, 4th, or grad. student) and semester(s) attended.

Name

Year in School

Semester(s) Attended

Be sure to provide 1098-T, 1098-E, and 1099-Q forms with your documents, even if they are in your dependent child's name. Also, please include a transcript from the school of the amounts paid for tuition. The 1098-T is not always an accurate reflection of the amounts paid. 1098-Ts are often available on the student's online account with the school.

12.) Did you pay any estimated Federal or State taxes (not withholding) for TY 2023? ☐ Yes ☐ No

If yes, please provide amounts and dates:

Federal Estimated Payments		State Estimated Payments	
<u>Amount</u>	<u>Date Paid</u>	<u>Amount</u>	<u>Date paid</u>
\$ _____	____/____/____	\$ _____	____/____/____
\$ _____	____/____/____	\$ _____	____/____/____
\$ _____	____/____/____	\$ _____	____/____/____
\$ _____	____/____/____	\$ _____	____/____/____

13.) Did you purchase an electric or hybrid vehicle in 2023? ☐ Yes ☐ No

If yes, please provide a copy of the required auto dealer report detailing certain information such as:

Year, make and model of vehicle _____

Vehicle Identification Number _____

Date vehicle was placed in service (delivered to you) _____

Cost of the vehicle _____

14.) Did you make any qualified energy-efficient improvements to your home in 2023? ☐ Yes ☐ No

If yes, please provide the cost and a detailed explanation of the improvement (please provide a copy of the contract or invoice for the improvement, if possible).

For additional information or comments, please attach additional sheets as necessary.