



888 10th Street, Suite 2
Marion, IA 52302

P 319-447-4429 F 319-447-4434

NEW CLIENT QUESTIONNAIRE

Taxpayer Name _____ M/F Spouse Name _____ M/F

Occupation _____

Occupation _____

SSN _____ Birthdate _____

SSN _____ Birthdate _____

Tax Payer Phone _____

Spouse Phone _____

Taxpayer E-Mail _____

Spouse E-Mail _____

Address _____

Dependents Name (List Youngest First)	Birthdate	Social Security #	Relationship to You (Son, Daughter, Other)	Months Lived in Your Home in Past Year

Check All That Apply

Did you or your dependents have medical insurance provided by Marketplace exchange for **any** of the past year. (1095-A)
 Did you make **ESTIMATED** Federal or State tax payments in the last year in **addition** to withholdings. Federal \$ _____ State \$ _____
 Were you or your spouse a resident of another state or have earned income in another state in the past year?
Which state _____ Date moved in/out of IA this year _____
 New clients please provide copy of last year's tax returns
 Please provide copies of all driver's licenses and social security cards of dependents.

Banking information for refunds and payments: Name of Bank _____

Checking Savings Routing Number _____ Account Number _____

Are you self-employed? Yes If you received a 1099-NEC, a Sch C organizer must be completed (please request one.)

Check All That Apply

<input type="checkbox"/> Wage Statement – W-2s	<input type="checkbox"/> Contributions to IRAs	<input type="checkbox"/> Child Care Expenses
<input type="checkbox"/> Overtime Income (need last paystub)	<input type="checkbox"/> Alimony (Paid or Received)	<input type="checkbox"/> Medical/Dental Expenses
<input type="checkbox"/> Tips or Other Income	<input type="checkbox"/> Bought/Sold Primary Residence	<input type="checkbox"/> Mortgage Interest (1098)
<input type="checkbox"/> 1099-Misc/1099-NEC - need Sch C	<input type="checkbox"/> Lottery or Gambling Winnings	<input type="checkbox"/> Mortgage Points (i.e. closing points)
<input type="checkbox"/> Received Dividends	<input type="checkbox"/> Owned Rental Property - need Sch E	<input type="checkbox"/> Property taxes
<input type="checkbox"/> Received Interest 1099-INT	<input type="checkbox"/> Farm Income - need Sch F	<input type="checkbox"/> Charity or Religious Contributions
<input type="checkbox"/> Pension/Retirement Income 1099 R	<input type="checkbox"/> Distribution of foreign accounts	<input type="checkbox"/> Significant loss or Theft
<input type="checkbox"/> Social Security Income	<input type="checkbox"/> Financial interest virtual currency	<input type="checkbox"/> Had teacher un-reimbursed expenses
<input type="checkbox"/> Received Unemployment	<input type="checkbox"/> Cancellation of Debt	<input type="checkbox"/> HSA Form 1099SA
<input type="checkbox"/> Sold Stocks or Bonds	<input type="checkbox"/> Made student loan payments 1098E	<input type="checkbox"/> Business Extension Request \$50 Fee
<input type="checkbox"/>	<input type="checkbox"/> Pd Qualified Education Exp 1098T	<input type="checkbox"/> Personal Extension Request \$50 Fee

• **For new clients how did you learn about us?** _____

I certify that I would like my taxes prepared according to the information provided above.

Taxpayer Signature _____ Date: _____

Spouse's Signature _____ Date: _____