|  |  |  |
| --- | --- | --- |
| ***Please collect the following information (when applicable) and include with your hard copy tax documents.*** |  | *For questions, call*920-563-6562 *or email*recpt@forttaxservice.com |
| **ALL CLIENTS** |
|   | Name |   | \* Copy of driver’s license *(taxpayer and spouse, if applicable)* |
|   | **CURRENT** address |   | Dependents *(if applicable)* |
|   | Email |   | Primary Phone Number |
|  | Newly Married or Divorced in 2022, provide date |  |  |
| **NEW CLIENTS** |
|  | \* Copy of social security cards for *EVERYONE (including dependents)* listed on tax return |  | Date of birth for EVERYONE *(including dependents)* listed on tax return |
|  | \* Copy of last two year’s tax returns |  | \* Copy of driver’s license *(taxpayer and spouse, if applicable)* |
| **NEW FOR 2023**  |
| * Do you have an LLC? Remember to file an initial beneficial ownership info at https://www.fincen.gov/contact
* Energy Efficient Home Improvements
 |
| **INCOME & DEDUCTIONS** |
|   | \* W2’s from all employers |   | \* Charitable contributions and cash donations |
|   | \* 1099 forms -Unemployment 1099 G, 1099 INT, 1099 DIV, 1099 B, HSA 1099 SA, 1099 Brokerage Statement |   |  Medical expenses (including mileage) |
|  | Health insurance premiums (paid out of pocket) |  | Social security statements |
| **IF YOU OWN A PERSONAL RESIDENCE** |
|  | \* Mortgage interest (Form 1098) |  | \* Real estate taxes paid |
|  | \* Closing documents if you bought, sold or refinanced a home |  |  |
| **IF YOU OWN RENTAL PROPERTY (not typical)** |
|   | Rental income |   | Insurance premiums |
|   | Repairs & Maintenance |   | Real estate taxes paid |
|   | Mileage for repairs, inspections, etc. |   | Loan/Mortgage interest |
| **IF YOU OWN A BUSINESS OR FARM (not typical)** |
|   | Tax ID #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |   | 12/31/23 bank balances |
|   | List of capital assets and equipment *(date purchased & sold)* |   | Business use of home info, if applicable  |
|   | Business income and expenses |   | Mileage log |
| **OTHER (some areas not typical)** |
|  | Do you rent? How much? \_\_\_\_\_\_\_ Is heat included? Y or N |  | Did you purchase or sell any virtual currency |
|   | Did you make any IRA contributions? How much? \_\_\_\_\_\_ |   | Sales tax from vehicle purchase |
|   | \* Educational expenses (1098-T) loan interest, tuition, private school tuition, and supplies |   | \* Marketplace Health Insurance (1095-A) (1095B or 1095 C forms are not needed) |
|   | \* Cancellation of Debt (1098-C) |   | Long-term care premiums  |
|   | \* Gambling Income |   | Hobby income |
|   | Banking Info: If you are getting a refund, how would you like to receive it: MAILED CHECK or DIRECT DEPOSIT *(savings or checking)* |   | \*  Jury Duty |
|   | Child Care Expense and address (with Tax ID # or SSN of caregiver) |   | Estimated tax payments. How much paid and the date |
|  | Alimony paid or received |  | Check, Cash, Debit or Charge are acceptable options for payment. Or, taken from your refund *(for an additional fee)*? |
|  |  |  | How would you like your tax return? PAPER COPY or PORTAL (PDF) COPY |

*\* Hard copy forms are required, if applicable to you (portal copies are acceptable as hard copies)*