

Akron Income Tax Co.

TAXPAYER INFORMATION FORM

Did you file your taxes with us last year? YES NO

Short Form [] Long Form [] Business [] Rental(s) [] Stocks []

General Questions-----

Filing Status

| | | |
|------------------------|---|---------------------------------|
| Name _____ | DOB <u> </u> / <u> </u> / <u> </u> | MARRIED/Do it the best way! [] |
| Driver License # _____ | Issue Date <u> </u> / <u> </u> / <u> </u> | MARRIED/JOINT [] |
| | Expire Date <u> </u> / <u> </u> / <u> </u> | MARRIED/SEPARATE [] |
| Spouse _____ | DOB <u> </u> / <u> </u> / <u> </u> | HEAD OF HOUSEHOLD [] |
| Driver License # _____ | Issue Date <u> </u> / <u> </u> / <u> </u> | SINGLE [] |
| | Expire Date <u> </u> / <u> </u> / <u> </u> | PARENTS CLAIM ME (student) [] |

Current Address _____
 City/State/Zip _____

Contact Phone _____ EMAIL Address _____

What "City" if any, should we file for your local tax return. _____

Dependents -----

ALL CLIENTS

First Name of Each Dependents Please

| DEPENDENTS | LAST NAME | Birth | Age On | Mths in | SS## |
|------------|---------------------|-----------------------------------|---------------|---------|----------------|
| FIRST NAME | <u>IF DIFFERENT</u> | Date | 12/31 last yr | home | |
| _____ | _____ | <u> </u> / <u> </u> / <u> </u> | _____ | _____ | ____-____-____ |
| _____ | _____ | <u> </u> / <u> </u> / <u> </u> | _____ | _____ | ____-____-____ |
| _____ | _____ | <u> </u> / <u> </u> / <u> </u> | _____ | _____ | ____-____-____ |
| _____ | _____ | <u> </u> / <u> </u> / <u> </u> | _____ | _____ | ____-____-____ |

Tax Form Questions-----

Yes No Did you receive a 1095 A form for your Affordable Care Act insurance?

Yes No Did you receive any Advanced Health Care payments from the government?
 ===Please Include Form if you received it===

Yes No Were you notified by the IRS that you are required to complete a "Certification" for the Earned Income Credit? (EIC)

Yes No Could any other person claim your children this tax year?

Yes No Day Care? Form Enclosed? Whom to? Address? SS#? Amount?

Yes No Education Credit/Tuition Form Enclosed? What year of school? 1 2 3 4 5+

Long Form Only Questions-----

Yes No Mortgage Interest Form Enclosed?

Yes No Real estate taxes Form Enclosed? (Mortgage statement/tax bills)

Yes No Charity Donations Must Provide Charitable Letters

Other Notes
