

# Akron Income Tax Co.

## TAXPAYER INFORMATION FORM

Did you file your taxes with us last year? YES NO  
Did you receive ALL of your stimulus money? YES NO  
If not, how much did you receive? \_\_\_\_\_

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

### General Questions

#### Filing Status

Name \_\_\_\_\_ DOB \_\_\_/\_\_\_/\_\_\_ MARRIED/Do it the best way! [ ]  
Driver License # \_\_\_\_\_ Issue Date \_\_\_/\_\_\_/\_\_\_ MARRIED/JOINT [ ]  
SS # \_\_\_-\_\_\_-\_\_\_ Expire Date \_\_\_/\_\_\_/\_\_\_ MARRIED/SEPARATE [ ]  
Spouse \_\_\_\_\_ DOB \_\_\_/\_\_\_/\_\_\_ HEAD OF HOUSEHOLD [ ]  
Driver License # \_\_\_\_\_ Issue Date \_\_\_/\_\_\_/\_\_\_ SINGLE [ ]  
SS# \_\_\_-\_\_\_-\_\_\_ Expire Date \_\_\_/\_\_\_/\_\_\_ 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	DEPENDENTS	LAST NAME	Birth	Age On	Mths in	
	FIRST NAME	<u>IF DIFFERENT</u>	Date	12/31 last yr	home	SS##
First Name of Each Dependents Please	_____	_____	___/___/___	___	___	___-___-___
	_____	_____	___/___/___	___	___	___-___-___
	_____	_____	___/___/___	___	___	___-___-___
	_____	_____	___/___/___	___	___	___-___-___

### 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 1095A 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+  
Yes No Charity Donations Must have Proof & Amount limited to \$300 Total \$ \_\_\_\_\_

### Long Form Only Questions

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