

Intake Form



Tax Year _____ Phone _____ SSN _____ - _____ - _____

Name _____
Address _____
City _____ State _____ Zip _____
Email address _____

<u>Gregory's Use only</u>
<u>Last Year</u>
Fed \$ _____ i
State \$ _____ i
State \$ _____ i
Bill \$ _____
MT EC \$ _____

Filing Status (check one)

Single..... _____ **Married Filing Separate**..... _____
Married..... _____ **Head of Household**..... _____

Please answer with a YES or NO or an amount

- | | |
|---|---|
| Are you a returning client?..... _____
How many children will you be claiming this year..... _____
Are you custodial Parent for All children claiming?..... _____
Can you claim anyone else?..... _____
Are you being claimed by anyone else?..... _____
How many W2 Forms for this year?..... _____
How many 1099 Misc forms?..... _____
How many 1099R Forms?..... _____
Did receive a 1099C? (Cancellation of Debt)..... _____
Any Gambling Income—W2G..... _____
Mortgage Interest?..... _____
Are you a College Student?..... _____
Did you pay any College Tuition..... _____ | Did you receive Unemployment?..... _____
Social Security Income?..... _____
Any Interest Income? Dividends?..... _____
Do you have a Foreign account (s)?..... _____
Have Daycare expenses?..... _____
Personally contribute to a retirement?..... _____
Withdraw from a retirement?..... _____
Spend any Cryptocurrency? (Bitcoin)..... _____
Do you have business/Rental Income?..... _____
Health Insurance for all in household for all 2018..... _____

Any other type income? IF so what? _____
_____ |
|---|---|

The undersigned guarantees that all information provided to Gregory's Tax and Bookkeeping Service for the purpose of preparing income tax returns is true and accurate. This also constitutes a contract with Gregory's Tax and Bookkeeping Service for the purpose of preparing income tax returns and the undersigned agrees to be responsible for all charges incurred in that process.

Signature _____