

# Intake Form



Tax Year \_\_\_\_\_ Phone \_\_\_\_\_ SSN \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Name \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Email address \_\_\_\_\_

**Gregory's Use only**

Last Year

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 on each line.**

- 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 forms?(Misc/Other)..... \_\_\_\_\_
- How many 1099R Forms?..... \_\_\_\_\_
- Did receive a 1099C? (Cancellation of Debt)..... \_\_\_\_\_
- Any Gambling Income—W2G..... \_\_\_\_\_
- Mortgage Interest?..... \_\_\_\_\_
- Are you a College Student?..... \_\_\_\_\_
- Are you a Tribal Member? (need Certificate)..... \_\_\_\_\_
- 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 Care from Market Place? 1095A form \_\_\_\_\_
- Stimulus 1 received \$ \_\_\_\_\_
- Stimulus 2 received \$ \_\_\_\_\_

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 \_\_\_\_\_