

Intake Form



Tax Year _____ Phone _____ SSN _____ - _____ - _____

Name _____ Date of Birth _____
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..... _____
Married Filing Separate..... _____
Head of Household..... _____

Please answer with a YES or NO on each line.

- Are you a returning client? (from last year)..... _____
- 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 you 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..... _____

Please answer with a YES or NO on each line.

- 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.... _____
- March 2021 Stimulus 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 _____ Date _____