

# Intake Form



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

|                            |                                     |
|----------------------------|-------------------------------------|
| <b>Name</b> _____          | <b>Date of Birth</b> _____          |
| <b>Address</b> _____       |                                     |
| <b>City</b> _____          | <b>State</b> _____ <b>Zip</b> _____ |
| <b>Email address</b> _____ |                                     |

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

**Filing Status (check one)**

**Single**..... \_\_\_\_\_      **Married Filing Separate**..... \_\_\_\_\_  
**Married**..... \_\_\_\_\_      **Head of Household**..... \_\_\_\_\_

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

**Did you receive Health Ins from the Market Place (Obama Care) form 1095 A \_\_\_\_\_**

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** \_\_\_\_\_