

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

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)..... _____
Withdraw from a retirement?..... _____
How many 1099R (Pension/Annuity) Forms?..... _____
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 Unemployment?..... _____
Social Security Income?..... _____
Any Interest Income? Dividends?..... _____
Do you have a Foreign account (s)?..... _____
Have Daycare expenses?..... _____
Personally contribute to a retirement?..... _____
Spend any Cryptocurrency? (Bitcoin)..... _____
Did you have Rental Income..... _____
Do you have A business..... _____

Did you receive Health Ins form 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** _____