Innovative Tax Solutions

TAX PREPARATION ORGANIZER - CLIENT INTAKE SHEET

TAXPAYER INFORMATION

Circle one: **Current Taxes / Amendment**
Circle: **2021 / 2022 / 2023 / 2024 / 2025**

Personal Information

Taxpayer:

- ▢ **Name: _____**
- ▢ **Phone: _____**
- ▢ **SSN (REQUIRED BY IRS): _____**
- ▢ **DOB (REQUIRED BY IRS): _____**
- ▢ **Email: _____**
- ▢ **Address: _____**
- ▢ **Occupation: _____**

Spouse:

- ▢ **Name: _____**
- ▢ **Phone: _____**
- ▢ **SSN (REQUIRED BY IRS): _____**
- ▢ **DOB (REQUIRED BY IRS): _____**
- ▢ **Email: _____**
- ▢ **Occupation: _____**

▢ **County of Residence: _____**

▢ **School District of Residence: _____**

▢ **Identity Protection PIN (IP PIN) from IRS: _____**

▢ **Did you have any carryovers from a prior year (capital loss, at-risk, passive loss, NOL, or credit carryforwards)?** (Y/N):

▢ **At any time during 2025, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of, a digital asset (or a financial interest in a digital asset)?** (Y/N): _____

Social Security Benefits

Did you or your spouse receive Social Security in **2025**?
Circle one: YES / NO

Bank Account Info for Direct Deposit/Direct Debit: (Please leave blank if you plan to pay balance independently.)
Routing #: _____ Account #: _____

Head of Household (if applicable)

▢ **Were you unmarried or considered unmarried on the last day of the year?** (Y/N): _____
▢ **Did you pay more than half the cost of keeping up a home?** (Y/N): _____
▢ **Did you have a qualifying person/dependents living in your home more than half the year?** (Y/N): _____

Dependents

If you have dependents, please complete every question as required by the IRS.

Dependent Name:	SSN:	DOB:	Lived with you more than 6 Months (Y/N):	Dependents relationship to you:	FT College Student (Y/N):

▢ **Are all dependents U.S. residents?** (Y/N): _____

College Students

▢ **Was the student enrolled more than half-time in an eligible institution?** (Y/N): _____
▢ **Did the student receive Form 1098-T?** (Y/N): _____
(If yes, include the form with your tax paperwork.)

How many years has the student received the American Opportunity Tax Credit? _____

▢ **Is the taxpayer only claiming qualified tuition and expenses for the student?**
(Tuition, required fees, books, supplies, equipment) (Y/N): _____