

NEW CLIENT QUESTIONNAIRE

By engaging me to prepare your taxes, you acknowledge that I will do so based on the information you provide. It does not include auditing or verifying the information provided. You agree to provide all income and deductible expense information. You affirm that all expenses or deduction amounts are accurate and can be supported by documentation. You would be required to produce these records in case of an examination by the IRS or a state authority. You agree you will confirm the accuracy of the return before signing it. Services will include a reasonable amount of assistance and consultation during the year and will not result in additional charges.

Please do not guess at the answers to the questions on these pages. Incorrections will slow the processing of a tax return.

STUFF I HAVE TO KNOW

Your name, as it appears on your social security card:

Your social security number:

Your date of birth:

Your occupation:

The address you want to use on your tax return:

Your primary phone number:

Your email address:

Are you a US citizen?

What will your filing status be? Married Filing Jointly?
Married Filing Separately?
Single?
Head of Household?

If you are married...

Your spouse's name as it appears on a social security card:

Your spouse's social security number:

Your spouse's date of birth:

Your spouse's occupation:

If you have dependents...

Names-----Dates of birth--Social security numbers—Relationship

Is each of your dependents a US citizen?

Can you provide evidence, such as school or health care records, to substantiate your eligibility for any child related credits to which you may be entitled?

Have you had any credits denied or reduced in a prior year?

Did each of your dependents reside with you for more than half of 2021?

Is there a release of exemption at play?

Did everyone in your household get a permanent fund dividend?

Did you receive the \$1400 per household member economic impact payment? Lesser amount?

Did you receive Advance Child Tax Credit payments? How much?

Did you receive income from or reside in a state other than Alaska in 2021?

Did you receive a subsidy for health care insurance?

How would you like your tax return delivered?

Email?

Parked in the cloud?

USPS?

Anything else?

Privacy Policy. The nature of this work requires me to collect certain nonpublic personal information about you from various sources. I may collect financial and personal information from applications, worksheets, reporting statements, and other forms. Under this policy, all information obtained about you will be provided by you or obtained with your permission. My firm has procedures and policies in place to protect your confidential information. I restrict access to your confidential information to those within my firm who need to know to provide you with services. I will not disclose your personal information to any third party without your express permission, except where required by law. I maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.