

Client Intake Form

<u>Basic Information</u>	Primary Taxpayer	Spouse
Full Name		
Soc. Sec. #	____ - ____ - ____	____ - ____ - ____
Occupation		
Date of Birth	____ / ____ / ____	____ / ____ / ____
Email Address		
Phone Number		

Divorced/separated/widowed? Yes No

Home Address: _____

<u>Dependents</u>	If unsure whether a person is your dependent, list the person and tell your tax preparer.		
Name	Relationship	Soc. Sec. #	Birth Date
		____ - ____ - ____	__ / __ / __
		____ - ____ - ____	__ / __ / __
		____ - ____ - ____	__ / __ / __
		____ - ____ - ____	__ / __ / __

Taxpayer or Spouse live or work outside of Hawaii? Yes No

Taxpayer or Spouse a non-resident alien? Yes No

Taxpayer or Spouse has a foreign bank account or other foreign assets? Yes No

How did you hear about us? **Internet** **Family** **Friend** **Walk-in** (please circle)

Who may we thank for the referral? _____

Tax Payments (other than withholdings):

Paid estimated taxes? Yes No

Federal Amount Paid: \$ _____ State Amount Paid: \$ _____

Paid taxes with extension? Yes No

Federal Ext. Amount Paid: \$ _____ State Ext. Amount Paid: \$ _____

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Is the Taxpayer or Spouse legally blind/deaf? Yes No Whom _____

Have you ever claimed the Residential Energy Credit in a prior year? Yes No

(this would include Solar Panels, Solar Hot Water Heater, Windows, Doors, etc) Year of Credit? _____

Have you claimed the First Time Home Buyer credit of \$7500 in 2008/2009? Yes No

2020 Stimulus Payments received: (*Amounts needed only if filing the 2020 return*)

EIP 1: \$ _____ EIP 2: \$ _____

2021 Stimulus Payment Total Received: (*Amounts only needed if filing a 2021 return*)

EIP 3: \$ _____ (*\$1400 per person on original return*)

2021 Adv. Child Tax Credit Total Received: (*Amounts needed only if filing a 2021 return*)

\$ _____

Did any dependents receive Child Care? Yes No

Did you contribute to a Traditional/Roth IRA in 2022? Yes No

Did the Taxpayer, Spouse, or any dependent attend a qualified college, university, or trade school? Yes No

Do you have a small business? i.e. Uber, Monet, Amway, etc Yes No

Is the Taxpayer or Spouse a member of the HI National Guard/Reserves? Yes No

Banking Information

Preferred Payment Methods:

Tax Refunds: Check Direct Deposit

Tax Payments: Check Electronic Withdrawal

Direct Deposit/Direct Withdrawal Information:

Checking Account

Savings Account

Name(s) on Account: _____

Name of Financial Institution: _____

Routing #: _____

Account #: _____