

Tax Questionnaire

Name: _____ :

1. Current address: _____ :

2. Phone Number: _____ :

3. Health insurance: Yes or No Check : Yes or No _____ :

4. Direct deposit : Account # Routing #: _____ :

Bank Name: _____ **:Checking Savings** _____ :

5. Any new children: Name: _____ **:Birth Date:** _____ :

6. Property taxes: _____ :

7. Rent :Name & Address of landlord: _____ :

Amount Paid: _____ **# of months paid:** _____ :

8. Homeschool: How Many? : Parochial School: How Many? _____ :

9. Children under 19: Parents claim? Yes or No : _____

10. Stimulus amount: 1. \$ _____ :

11. Driver's License or ID card copied: Yes []: _____

12. Unemployment : Yes or No : _____

13. Advance Child Tax Credit: Total amount _____ :

14. Invoice # _____ :

Need form 1098 if they have a mortgage & form 1099-Int if they have interest from the bank.