

PLEASE PROVIDE:

NEED ID

HAVE ID

TAXPAYER & SPOUSE: COPY OF DRIVER'S LICENSE

ALL PERSONS ON RETURN: COPY OF SOCIAL SECURITY CARDS

(IRS & State require us to have these on file. It protects our clients and us from potential fraud)

NAME:

MAIN CONTACT:

MAIN PH#:

TEXT?

ADDRESS:

EMAIL:*

*If you provide an email, please monitor it for questions.

1. If New, who **REFERRED** you to our office?
2. Are all **W2's & 1099's** provided?
3. Did anyone receive any **RETIREMENT DISTRIBUTIONS** & are all 1099-Rs provided?
4. **NAMES OF DEPENDENTS** you are claiming this tax year? _____
 - a. If they are a **NEW** dependent, we need Full LEGAL Name with a copy of the Social Security Card & Date of Birth.
 - b. Have you included any of your **Dependent's W2s**?
 - c. Are you REMOVING a prior dependent? Name _____
5. **CHILDCARE** expenses? Letter from childcare provider needs to provide the following information:
 - a. Daycare Name/Tax ID#
 - b. Amount Paid per month/How many months
 - c. Address of Provider
6. Total **CHILD SUPPORT** received (This is not taxable but needed for possible credits): _____
7. Total **ALIMONY** received, if any? _____ Year alimony started: _____
 - a. Required: Name and Social Security #'s of who received and who paid if payments started before 2019.

8. **DIGITAL CURRENCY**: Did you receive, sell, send, exchange, or acquire, any digital currency, such as bitcoin or property?
 - a. If yes, we will need a transaction report/1099-B (Composite).
9. Are you **SELF-EMPLOYED**?
 - a. If yes, please be sure to provide *Total Income* and *Itemized Expenses/Deductions*.
 - b. If this is your 1st year, please fill out a Schedule C Due Diligence form located on our website or at our front desk.
 - c. There are a variety of worksheets for self-employed located on our website at musselmantax.com
10. **HEALTH CARE COVERAGE**:
 - a. Did you purchase your health care through the **Marketplace**? If so, please provide your 1095-A form(s).

(TURN OVER)

11. **ITEMIZED ITEMS:** (Only include if you usually itemize) out of pocket Medical Expenses, Medical Mileage, License Tabs, PAID Property Taxes, Mortgage Interest (1098 Statement), Charitable Contributions, Gambling Income & Gambling Losses. Substantiating paperwork must be provided.

12. Did you purchase an **ELECTRIC CAR**? If so,

Make & Model of vehicle _____ Vehicle Year _____

Purchased New or Used? _____ Purchase Price _____ Date of Purchase _____

13. Did you have any **HOME ENERGY IMPROVEMENTS** that would qualify you for an Energy Credit? Some examples are energy efficient windows, doors, insulation, roofing, water heaters, solar panels, furnace, etc. (NO APPLIANCES).

If so, receipts that show where it was purchased, what the purchased improvement was, the date of purchase and the total cost, must be provided.

MICHIGAN CREDITS – If you paid health insurance premiums during the tax year, please provide the amount paid, this helps calculate the credits.

14. Do you **RENT**? (**Rent Credit**)

a. Name(s) on the lease (yours MUST be on it in order to receive the credit): _____

b. Who did you pay it to and what is their address: _____

c. Amount paid per month / # of months paid: _____

d. Is heat in your name? YES NO Is heat included in Rent cost? YES NO

15. **HOMEOWNERS PROPERTY TAX CREDIT:**

Please provide copies of *both* summer and winter property tax bills. The tax bills do not need to have been paid. Verify the bills are for the correct year. The summer tax bill comes during the tax year and the winter tax bill comes the *following year* even though it is for the tax year being prepared.

16. **Direct Deposit for Refunds**

Bank Name _____ Checking Savings (Circle One)

Bank Routing Number: _____ Account Number _____

17. **Debit Account to Pay** When E-filing Tax Return for Tax Owed Instead of Mailing a Check

Bank Name _____ Checking Savings (Circle One)

Bank Routing Number: _____ Account Number _____

(TURN OVER)

18. Would you like your tax preparation fee taken out of your refund? The bank charge is \$72.95 which is in addition to the tax preparation fee. If you do not get a refund or owe back taxes, you will not qualify. If the bank does not approve of this transaction, you will be responsible for the tax preparation fee. YES NO

(TURN OVER)