

2023 Taxpayer Information Sheet

Taxpayer Information

First Name _____ Last Name _____

SSN _____ - - _____ DOB _____ / / _____ Occupation _____

Address _____

City _____ State _____ Zip Code _____

Cell # _____ - - _____ Email _____ @ _____

Marital Status on 12/31/2022

Married Not married

Can anyone else claim you as a dependent?

Yes No

Spouse Information

First Name _____ Last Name _____

SSN _____ - - _____ DOB _____ / / _____ Occupation _____

Cell # _____ - - _____ Email _____ @ _____

Filing Status?

Jointly (MFJ) Separately (MFS)

Can anyone else claim you as a dependent?

Yes No

Additional Information

of W-2's _____ # of 1099 NEC _____ Do you have any other income? Yes No

If yes, describe _____

Did you or anyone on your return have marketplace insurance at any point during the year?

Yes No If yes, you are required to provide your 1095A

Will you be claiming any dependents?

No Yes How many? _____

If available, what advance product would you like to apply for? Check one.

None No-cost advance (up to \$1000) Max advance (up to \$6000)

Have you filed taxes with Sun Loan before? No Yes, location: _____

Referred By: _____

I the undersigned, hereby certify that all the information provided above is true and correct. By signing I authorize Sun Loan to file my return using the information I have provided.

Taxpayer Signature _____ Date _____

Spouse Signature _____ Date _____