

2023 Taxpayer Information Sheet

Taxpayer Information

First Name _____ Last Name _____
 SSN _____ - - _____ DOB _____ / / _____ Occupation _____
 Address _____
 City _____ State _____ Zip Code _____
 Cell # _____ - - _____ Email _____ @ _____

Marital Status on 12/31/2023

Married Not married

Can anyone else claim you as a dependent?

No Yes

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?

No Yes

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 _____