

# Taxpayer Information Sheet

Please have the taxpayer fill out this sheet correctly and legibly to ensure a quick and accurate refund. Double check that the spelling of all names, social security numbers, and the date of birth information are correct and as they appear on the social security cards.

## Taxpayer Information

First Name \_\_\_\_\_ Last Name \_\_\_\_\_

SSN \_\_\_\_\_ - - \_\_\_\_\_ DOB \_\_\_\_\_ / / \_\_\_\_\_ Occupation \_\_\_\_\_

Address \_\_\_\_\_ Phone # \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Marital Status on 12/31/2021

Married  Single, Divorced, or Widowed

Can anyone else claim you as a dependent?

Yes  No

## Spouse Information

First Name \_\_\_\_\_ Last Name \_\_\_\_\_

SSN \_\_\_\_\_ - - \_\_\_\_\_ DOB \_\_\_\_\_ / / \_\_\_\_\_ Occupation \_\_\_\_\_

Address \_\_\_\_\_ Phone # \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Can anyone else claim your spouse as a dependent?

Yes  No

## Required 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

How much was your third stimulus amount (before any offset)? \_\_\_\_\_

This amount can be found on Notice 1444 from the IRS

Did you receive any advance child tax credit payments?

Yes  No If yes, you are required to complete the ACTC Payment worksheet

*I the undersigned, hereby certify that all the information provided above is true and correct.*

Taxpayer Signature \_\_\_\_\_ Date \_\_\_\_\_

Spouse Signature \_\_\_\_\_ Date \_\_\_\_\_