

Client Information



Sims Tax Solutions

Referred By: _____

Primary Taxpayer

Full Name

Social Security #/ITIN

DOB

Street Address

City

State

Zip

Email

Phone #

Occupation

Marital Status: ☐ Single ☐ Divorced ☐ Widowed

Spouse

Full Name

Social Security #/ITIN

DOB

Street Address

City

State

Zip

Email

Phone #

Occupation

Client Interview



Sims Tax Solutions

Dependents:

<u>Name</u>	<u>Relationship</u>	<u>DOB</u>	<u>SSN/ITIN</u>	<u>Student</u>	<u>Disabled</u>

Income Sources

- ☐ Employer _____ (W-2)
- ☐ Unemployment _____ (1099-G)
- ☐ Social Security _____ (1099-SSA)
- ☐ Retirement Dist. _____ (1099-R)
- ☐ Interest _____ (1099-Int)
- ☐ Dividends _____ (1099-Div)
- ☐ Stock/Mutual Fund Sale _____ (1099-B)
- ☐ Self-employment _____ (1099-Misc)
- ☐ Gambling Winnings _____ (W2-G)
- ☐ Self-employment Expenses
- ☐ Rental Property
- ☐ Farm
- Other _____

Miscellaneous

- ☐ Refi/Sold/Purchased Home _____
- ☐ Paid/Received Alimony _____
- ☐ Lived in a Disaster Area _____
- ☐ Gambling Winnings/Losses _____
- ☐ IRA Contributions _____
- ☐ Foreign Income/Assets/Account _____
- ☐ Marketplace Insurance _____ (1095-A)
- ☐ Energy Efficient Improvements _____
- Other _____

Itemized Expenses

- ☐ Donated Cash or Goods
- ☐ Major Taxable Purchase
- ☐ Mortgage Payment (1098-E)
- ☐ Paid Property Tax
- ☐ Large Medical Expenses

Household/Dependents

- ☐ Changed Family/Marital Status
- ☐ Adopted a Child
- ☐ Dependent Care Expenses
- ☐ Education Expenses (1098T)
- ☐ Student Loan Interest
- ☐ HSA Contribution
- ☐ Other _____