

**Tax Therapy, LLC**  
**TY \_\_\_\_\_ Tax Preparation**  
**Client Interview**

Name:

|   |        |                    |  |
|---|--------|--------------------|--|
| Address:  |        |                    |  |
| City:   | State: | ZIP:               |  |
| E-mail:   |        | Phone:             |  |
| Contact by <input type="checkbox"/> Phone <input type="checkbox"/> E-mail |        | Best time to call: |  |

**Taxpayer and Spouse**

**Primary**

**Spouse**

Name:

Name:

|  |          |  |          |
|--|----------|--|----------|
| Date of Birth:   |          | Date of Birth:   |          |
| SSN:   |          | SSN:   |          |
| DL#  | State:   | DL#  | State    |
| Issued:  | Expires: | Issued:  | Expires: |
| <input type="checkbox"/> Healthcare Coverage All Year? |          | <input type="checkbox"/> Healthcare Coverage All Year? |          |

**Dependents**

Name:

Name:

|  |  |  |  |
|--|--|--|--|
| Relationship:  |  | Relationship:  |  |
| Date of Birth:   |  | Date of Birth:   |  |
| SSN:   |  | SSN:   |  |
| # Days in Home:  |  | # Days in Home:  |  |
| <input type="checkbox"/> Healthcare Coverage All Year? |  | <input type="checkbox"/> Healthcare Coverage All Year? |  |

Name:

Name:

|  |  |  |  |
|--|--|--|--|
| Relationship:  |  | Relationship:  |  |
| Date of Birth:   |  | Date of Birth:   |  |
| SSN:   |  | SSN:   |  |
| # Days in Home:  |  | # Days in Home:  |  |
| <input type="checkbox"/> Healthcare Coverage All Year? |  | <input type="checkbox"/> Healthcare Coverage All Year? |  |

### Income (Check all that apply. Attach W2s, 1099s, K1s as appropriate.)

- Wages/Unemployment
- Contractor/Non-employee Compensation
- Gig Economy (uber, task rabbit, etc.)
- Personal Property Rentals (AirBnB, etc.)
- Social Security/Retirement
- Interest/Dividends
- Partnership or Corporate Interests
- Alimony, Gambling, Hobby, or Other (describe)

Notes:

### Income Continued (Check all that apply. Attach 1099 as appropriate.)

- Small Business Income (Sch C)
- Rental or Royalty Income (Sch E)
- Farm or Ranch Income (Sch F)
- Bought/Sold Real Property
- Bought/Sold Stocks/Bonds
- Bought/Sold Cryptocurrency
- Cancelled Debt
- Bought or Cashed Savings Bonds
- Other (describe)

***Please include income/expense worksheets and other information as appropriate.***

Notes:

### Deductions (Check all that apply.)

- State/Local Income Taxes and/or Property Taxes (primary residence, vacation home, land, etc.)
- Mortgage/Investment Interest
- Substantial Out of Pocket Medical (insurance premiums, prescriptions, co-pays, etc.)
- Major Purchases (car, boat, RV, large repairs or remodeling, etc.)
- Student Loan Interest
- Tuition and Fees for Post-secondary Education (provide 2017 statement of accounts and 1098-Ts)
- IRA Contributions (Traditional or Roth)
- Daycare Expenses (include provider name, address, EIN or SSN, and phone number)
- Other (alimony, moving, educator expenses, charitable contributions, gambling losses, etc.)

Notes:

### Other (Check all that apply.)

- Own or have signature authority on non-U.S. financial accounts (includes cryptocurrency and online gaming)
- Own other foreign accounts or assets (property, cryptocurrency, etc.)
- Have household employees (regular staff)
- Office in Home (self-employed)
- Foreclosure or Bankruptcy
- Worked in a state other than your resident state (list)
- Adopted a child

### Miscellaneous

Contribute \$3 to Presidential Election Fund:     Primary     Spouse

Dependent(s) Over 18 is/are full-time student(s) [list]:

|  |     |     |     |      |
|--|-----|-----|-----|------|
| <input type="checkbox"/> Estimated Federal Taxes Paid in TY____: | Qu1 | Qu2 | Qu3 | Qu4  |
| <input type="checkbox"/> Estimated State Taxes Paid in TY____:   | Qu1 | Qu2 | Qu3 | Qu 4 |

- Person(s) named on return are blind/disabled (list):
- Primary or Spouse is a dependent on another return(list):
- Do **not** want a paper copy of tax return (electronic only)
- Want refund/balance due directly deposited/debited

Bank Name

Checking

Savings

Routing #:

Account #:

### Additional Notes or Questions