

**Tax Therapy, LLC**  
**TY2023 Individual Tax Preparation**  
**Annual Client Interview**

**Please take your time and complete the interview as thoroughly and accurately as possible.**

**This interview must be completed before I begin work on your return.**

If you have questions about an item of income or a deduction please include them in the space(s) available. *Questions submitted by phone, e-mail, or secure message will cause delays in return processing.*

**If you are a returning client** please enter the Driver’s License information to ensure that what is on file is up to date. Please make updates to your physical address, e-mail address, and phone number(s) if they have changed. If you are a returning client we have your SSN and your dependents’ SSN information (if applicable) on file. You only need to complete those items if you have added a dependent, removed a dependent, or changed your legal name. **If you, your spouse, or your dependents have one, please enter your current IRS Identity Protection PIN in the space(s) provided.**

**General Information**

**Primary**

**Spouse**

Name:

Name:

Date of Birth:		Date of Birth:	
SSN:	IP-PIN:	SSN:	IP-PIN:
DL#	State:	DL#	State
Issued:	Expires:	Issued:	Expires:
Address:			
City	State	ZIP	
E-mail:	Phone:	E-mail:	Phone:
Occupation:		Occupation:	

**Banking Information**

Please deposit my refund(s) to my bank account.

Please debit my bank account for any balance(s) due on \_\_\_\_\_\*

*If no date entered the amount will be debited on the 10<sup>th</sup> of the month of the applicable filing deadline.*

Bank Name

Checking

Savings

Routing #:

Account #:

**Public Election Financing (does not affect your refund/balance due)**

**Taxpayer:** I want to contribute \$3 to the Presidential Election Campaign Fund.

**Spouse:** I want to contribute \$ 3 to the Presidential Election Campaign Fund.

### Foreign Accounts & Cryptocurrency

- I **do not** own cryptocurrency or other digital assets (NFTs, etc.)
- I **do not** own or have signature authority on non-US financial accounts
- I have money in online gaming accounts
- I own other foreign assets (property, etc.)
- I have relatives living in another country

### Dependents (if you have more than four please attach a list)

Name:	Name:
Relationship	Relationship:
Date of Birth:	Date of Birth:
SSN:	SSN:
IP-PIN:	IP-PIN:

Name:	Name:
Relationship	Relationship:
Date of Birth:	Date of Birth:
SSN:	SSN:
IP-PIN:	IP-PIN:

### Estimated Payments

Please provide dates and amounts **or let me know that the information was previously uploaded to TaxDome**. Attach the stubs from your payment vouchers if available. *Do not include payments for federal or state **balances due**.*

Federal Estimated Tax Payments	Qu1	Qu2	Qu3	Qu4
State Estimated Tax Payments	Qu1	Qu2	Qu3	Qu 4

Notes:

### 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.)
- Gambling, Hobby, or Other (describe)
- Social Security/Retirement
- Interest/Dividends
- Partnership or Corporate Interests
- Employer Stock Options
- Investment Income (stocks, crypto, etc.)

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
- IRA Contributions (Traditional or Roth)
- Daycare Expenses
- Educator Expenses
- Other (describe)

Notes:

### Other Information

- Got married
- Got divorced or separated
- Had a child
- Adopted a child
- No longer supporting a dependent
- Moved to a new state
- Date left old state:
- Date entered new state:
- Household employees (regular staff)
- Foreclosure or Bankruptcy
- Legal Settlement
- Inheritance or Gifts
- Made large gifts of money or other property
- Worked in a state or states other than your resident state (list)
- Adopted a child
- Received Medicaid/Medicare payments for taking care of a household member

### Additional Notes, Questions, Information

Notes: