CLEAR STRATEGY

Tax Intake | Client Information

Tax Year 2023 or ________________ **Date:** ____________________________

(T) Name: ____ DOB: ______________ SSN: ______________________

(S) Name: ____ DOB: ______________ SSN: ______________________

Address: ____

City: ____ State: ______________ ZIP: ______________________

(T) Phone: ________________________________ (S) Phone: ________________________________

(T) E-mail: ________________________________ (S) E-mail: ________________________________

(T) Occupation: ____________________________ (S) Occupation: ____________________________

(T) IRS Pin: _______________________________ (S) IRS Pin: _______________________________

Filing Status: S MFJ MFS* HOH QSS

*MFS - Spouse Name: ____ SSN: ______________________

Does Spouse itemize on separate return? *yes/no*

US Citizen? (T) *yes/no* (S) *yes/no* **Can you be claimed as a dependent?** (T) *yes/no* (S) *yes/no*

Blind? (T) *yes/no* (S) *yes/no* **Disabled?** (T) *yes/no* (S) *yes/no*

At any time during 2023, did you (**a**) recieve (*as a reward, award, or payment for property or services*): or (**b**) sell, exchange, gift, or otherwise dispose of a digital asset (*or a financial interest in a digital asset*)? *yes/no*

Dependents (*use another sheet if necessary*)**:**

Home			**Relationship**	**Months**
Name: ______________________	DOB: ________	SSN: ________	________	________
Name: ______________________	DOB: ________	SSN: ________	________	________
Name: ______________________	DOB: ________	SSN: ________	________	________

Income (*circle your answer*)**:**

- W-2's.. yes no # ______________
- Interest, 1099-INT................................... yes no # ______________
- Dividends, 1099-DIV.............................. yes no # ______________
- Pensions, IRA, 1099-R........................... yes no # ______________
- Social Security, SSA-1099...................... yes no # ______________
- Unemployment, 1099-G........................ yes no # ______________
- State or Local Refund............................ yes no
- Alimony.. yes no Date of Divorce: ______________________
- Misc.: Jury Duty, etc.............................. yes no

Schedules:

A- Itemized Deductions: Medical Expenses, Mortgage Statements- 1098; Property Taxes- Summer and Winter Statements; PPT- auto license fee; Charitable Contributions- Cash and Non-Cash
C- Business Income; Income and Expense statements
D- Capital Gains, 1099-B
E- Rental, Royalty, Partnership, S-Corp. income, 1099-Misc.
F- Farm income, 1099-PATR

Miscellaneous Information:

- Copy of Previous year's Tax Returns (*must have for accuracy*)
- Alimony Paid: $____________________ Divorce Date: ________________________
- Lump Sum Distribution
- Sale of Home, need closing statement and basis of home sold
- IRA/Retirement Contributions
- Student Loan Interest, 1099-E
- Estimated Tax payments, need $ amount and date's paid
- Carryover Amounts: Capital losses and Passive activities
- Education Expenses, 1098-T
- Adoption Expenses
- Child Care Expeneses; Provider name, address, EIN, $ amount paid
- HSA Contributions (*not through employer*)
- First Time Homebuyer Credit repayment (*2023 is final year*)
- Debt Forgiveness/Foreclosure, 1099-A, 1099-C
- Marketplace Insurance, 1095-A
- Teacher Expenses
- Home Energy Improvements

Refund Direct Deposit: (*Voided check or fill in*)

Bank Name: ____________________________________ Savings/Checking

RTN: ____

DAN: ____

Copy of Driver's License or State ID: (*If MFJ, need BOTH ID's*)

Credit Card Information
Card Type: ☐ *MasterCard* ☐ *VISA* ☐ *Discover* ☐ *AMEX* ☐ *Other* ______________________________
Cardholder Name (as shown on card): ____
Card Number: ____
Expiration Date (mm/yy): ________________________
Cardholder ZIP Code (from credit card billing address): ________________________

Interviewer: ____

Assigned to Tax Preparer: ____