



2020 Tax Client Intake Form

Returning clients: complete only the items that have changed

1. Taxpayer's Full Name (Must Match SS Card):

SSN: _____

DOB: _____

Filing Status: _____

Identity verified: DL scanned

Spouse's Full Name (Must Match SS Card)

SSN: _____

DOB: _____

2. Dependent's Full Name (Must Match SS Card):

SSN: _____

DOB: _____

Relationship: _____

Months lived with you in 2019: _____

Dependent's Full Name (Must Match SS Card):

SSN: _____

DOB: _____

Relationship: _____

Months lived with you in 2019: _____

- Is there another person who could claim your dependents? If yes, which ones?*

3. Current Address:

4. Contact Information:

Mobile: _____

Home phone: _____

Taxpayer Email: _____

Spouse Email: _____

5. New clients: have you provided last year's tax return?

- Yes No

6. Will your return include any of the following?

- Schedule C – Business
 Business Use of Home
 Schedule E - Rental Income

7. Any additional information:

Quote: _____

Please complete the additional questionnaire to assist us in properly preparing your return



Business Tax Intake Form

1. Business Name:

Owner Name:

EIN: _____

2. Did you use any accounting software?

Yes No

If so, what software was used?

Username: _____

Password: _____

3. Have following documents been provided:

- December bank, credit card, and year end loan statements
- Ending balance of any loans or liabilities on Dec. 31st, including year to date loan interest paid (if no statement provided)
- Inventory counts
- Copies of new bank loans obtained
- Purchase documents for equipment or fixed asset purchases over \$2500
- Copies of any federal or state letters received during the year
- 1099's and 1099-K (income from credit cards) received
- Copies of all payroll forms, (unless CORE handles your payroll) W-2's required
- Information on health insurance paid through the business
- Sales tax paid and amount outstanding as of Dec. 31st
- Sales breakout by state (if applicable)
- Information on changes in ownership, addresses, locations, or number of stores

4. Business Address:

5. Contact Information:

Mobile: _____

Business phone: _____

Email: _____

6. New clients: Have you provided last year's tax return?

Yes No

7. Any additional information:

Quote: _____