TAX ROUTING INTAKE FORM *(Existing Clients)* **DATE:** ______________________

SPG # 00____________ **APPT?** ______________________

Assigned To: ________________ **Completed By:** ________________

☐ NEW ☐ OOT ☐ LISCIO ☐ OWE ☐ AMEND ☐ WFI______ ☐ SV ______ __________

☐ SW______ ☐ NK______ ☐ KS____ ☐ JS______ ☐ DNS ____ ☐ DC ____ ☐ _____

NAME: Preferred Contact? ☐	**SPOUSE:** Preferred Contact? ☐
EMAIL:	EMAIL:
PHONE:	PHONE:
DOB:	DOB:

DEPENDENTS:

NAME	DOB	SS	PROOF OF RESIDENCY
1.			☐ Have ☐ Need ☐ Received
2.			☐ Have ☐ Need ☐ Received

If more is needed, please use the back of this form.

QUESTIONS:

1. Copy of Driver's License(s)	☐ Have	☐ Need	☐ Received	
2. Signed Engagement Letter	☐ Have	☐ Need	☐ Received	
3. Do you pay Real Estate Tax	☐ Have ☐ Need	Include the amount or provide statement $__________		
4. Did you pay to borrow 529 College?	☐ Yes ☐ No	Include the amount or provide December Statement $________		
5. Do you have Market Place Insurance?	☐ Yes ☐ No	☐ Include 1095		
6. Did you participate in a Health Savings Account?	☐ Yes ☐ No	If yes, list amount $__________________		
7. Is another person's tax return included in your submission?	☐ Yes ☐ No	If yes, please include contact information.		
8. Has any information changed from last year? *i.e., Married, divorced, new child, moved*	☐ Yes ☐ No	If yes, please explain:		
9. Do you typically owe on your returns?	☐ Yes ☐ No			
10. Are you waiting on information to complete your taxes this year?	☐ Yes ☐ No	If yes, please list:		
11. Did you pay estimated taxes?	☐ Yes ☐ No	Include payment amounts for QTR 1 – 4 or Totals		
12. Do you have foreign accounts?	☐ Yes ☐ No	Include highest amount balance in each account		

INTERNAL USE ONLY:

☐ Intake Logged	☐ LS Invite Sent	☐ Sch SE	☐ Sch F	☐ 943
☐ Updated UT	☐ 1099's x _______	☐ EIC	☐ Sch H	☐ 1040
☐ Updated QB	☐ K1 X _________	☐ Sch B	☐ 706	☐ 1041
☐ Updated LS	☐ W2 X _________	☐ Sch C x _______	☐ 709	
☐ Updated Personal File	☐ 1120	☐ Sch D	☐ 940	
☐ SDrive Created	☐ 1065	☐ Sch E	☐ 941	