

Taxpayer Name _____ Social Security Number _____ Date of Birth _____
Spouse Name _____ Social Security Number _____ Date of Birth _____

Filing Status:

Single	<input type="checkbox"/>
Married Filing Jointly	<input type="checkbox"/>
Married Filing Separately	<input type="checkbox"/>
Head of household	<input type="checkbox"/>
Qualified Widow(er)	<input type="checkbox"/>

Telephone Number: _____ Did your spouse pass away in 2022?
If so, please provide date? _____

Email Address: _____ Did you move in 2022? Yes: No:

Mailing Address: _____

List all the children/dependents you will be claiming in 2022 (if additional children, please add information on reverse side of the form):

Name: _____ SSN: _____ DOB: _____
Name: _____ SSN: _____ DOB: _____
Name: _____ SSN: _____ DOB: _____
Name: _____ SSN: _____ DOB: _____

Can anyone else claim any of the children above? Yes: No:
If so, which one(s): _____

Do you want your refund direct deposited? Yes: No:

Please provide a voided check for proof of information

Bank Name: _____ Routing #: _____ Account #: _____
What kind of account is it? Checking Savings

Did you make any estimated tax payments in for 2022? Yes: No:

Please list agency (IRS, PA, Local), dates, and amounts below:

(Continued on next page...)

Did you have health insurance through the marketplace/Penny?

(Please include Form 1095-A)

YES: No:

Did you have any nonprofit contributions 2022?

(This could include your church, humane societies, community centers, etc.)

How much? _____

Taxpayer's Driver's

License: Number: _____ Issued: _____ Expires: _____ State: _____

Spouse's Driver's

License Number: _____ Issued: _____ Expires: _____ State: _____

How will you receive your tax return?

mailing fee of \$8

PDF Copy (\$10 discount)	<input type="checkbox"/>
I will pick it up in person	<input type="checkbox"/>
I would like it mailed to me*	<input type="checkbox"/>

Will you be paying:

at pick-up (no fees apply)	<input type="checkbox"/>
via my refund (fees apply)	<input type="checkbox"/>

Please use the space below to let your preparer know of any changes in 2022 or any additional information necessary to complete your tax return: