

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"/>

Taxpayer Email Address: \_\_\_\_\_  
Spouse Email Address: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Did your spouse pass away in 2023?  
If so, please provide date? \_\_\_\_\_

Did you move in 2023? Yes:  No:

Mailing Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

List all the children/dependents you will be claiming in 2023 (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 2023? 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 2023?

(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 2023 or any additional information necessary to complete your tax return: