

Tax Drop Off Information (New Client)

FILING STATUS: MARRIED ____ HEAD OF HOUSE ____ SINGLE ____ M. FILING SEPARATE ____

TAXPAYER _____ SS# _____ Occupation _____ Birthday _____

SPOUSE _____ SS# _____ Occupation _____ Birthday _____

Dependent _____ SS# _____ DOB _____ Daycare? ____ Months at home _____

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Primary Phone #: () _____ Email: _____

2022 Tax Return copy included? _____ If not, we will need a copy.

Did you pay for health insurance NOT provided by an employer? Yes ____ No ____

If so, how much? _____

Did You receive a 1095A for Market place health coverage in 2023? Yes ____ No ____

Monthly Rent Amt Pd \$ _____ Heat: Incl ____ Not Incl ____ Months rented in '23 _____

Do you own a house? _____ (Include property tax bill paid in 2023)

Any Charity donations in 2023: Check/Cash \$ _____ Goods \$ _____ QCD's \$ _____

Any Unemployment Income in 2023? (1099G) Yes ____ No ____

Did anyone attend a post-secondary (College) during 2023? (1098-T) Yes ____ No ____

If yes, how many years of College did the student complete? _____

(If yes, please provide 1098-T from the school.)

Was anyone enrolled in a private grade or high school during 2023? Yes ____ No ____

(If yes, please provide a statement of paid tuition from the school.)

Any Student Loan interest paid in 2023? (1098-E) Yes ____ No ____

Any Investment Income? (yes/no) _____ (1099B) (1099Div) (1099Int)

Any Business Income? (yes/no) _____ (1099NEC)

Any Rental Income? (yes/no) _____ (1099Misc)

Any Cryptocurrency transactions? (ex. Bitcoin) Yes ____ No ____

Were you a WI resident all 12 mo? Yes ____ No ____ Prev State _____ Date moved to WI _____

Any Energy Efficient Home Improvements? Yes ____ No ____

New windows, Doors, or Insulation cost _____

Furnace, Central air, or Water heater cost _____

Who referred you to Kirsch Tax Service? _____

Driver's License Information

Taxpayer

License Number: _____

Issue Date: _____

Expiration Date: _____

State of issue: _____

Spouse

License Number: _____

Issue Date: _____

Expiration Date: _____

State of Issue: _____

BANKING INFORMATION (for Direct Deposit)

Name of Bank _____

Routing # _____

Account # _____

Account Type: Checking _____ Savings _____