

Intake/Interview Sheet

For Tax year 2022

Part I: Taxpayer Information Taxpayer Number: 1

Your First Name, M.I., Last Name, Date of Birth, SSN

US Citizen or Resident Alien, Legally Blind, Totally and Permanently Disabled, Occupation

Spouse's First Name, M.I., Last Name, Date of Birth, SSN

US Citizen or Resident Alien, Legally Blind, Totally and Permanently Disabled, Occupation

Address, Apt #, City, State, Zip Code

Phone Number and E-mail address, Could you or your spouse be claimed as a dependent on the income tax return of any other person?

On December 31st 2022, a. Were you: Single, Legally Married, Divorced, Widowed; b. If married, did you live with your spouse during any part of the last six months of the year?

Part II: Family and Dependent Information - Do not include you or your spouse.

Print the name of everyone who lived in your home and outside your home that you supported during the year.

Table with 6 columns: Name, Date of Birth, Relationship to you, Social Security Number, US Citizen Resident?, Number of months live with you

Income and Deductions

Part III: Income - Did you or your spouse receive:

Wages or Salary, Alimony Income, Disability Income, Unemployment, Interest/Dividends from saving accounts, bonds, CDs, or other accounts, Social Security, Self Employment Income from business, Other Income: Identify

Part IV: Expenses - Did you or your spouse make or have:

Alimony payment, Educational Expense, Home Mortgage Payments, Medical Expense, Charitable Contributions, Estimated Tax Payments for 2022, Contributions to IRA or Retirement

Please provide any W-2s, 1098s, 1099s, 1095 and other documents and send them to-

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Your business,

faith and trust are sincerely appreciated.

Odesho Vardeh, CPA, EA