

2023 CUSTOMER INFO SHEET—PERSONAL INCOME TAX

TAXPAYER INFORMATION:

LEGAL NAME: _____ SSN: _____
 ADDRESS: _____
 PHONE: _____ EMAIL: _____ DATE OF BIRTH: _____
 NAME YOU PREFER TO BE CALLED: _____ PRONOUNS: _____
 DRIVERS LICENSE #: _____ ISSUE DATE: _____ EXPIRATION: _____
 PREFERRED METHOD OF CONTACT: EMAIL PHONE
 PREFERRED TAX PREPARER: EVE ANNE SAMANTHA ELLIS RYAN NO PREFERENCE

WERE YOU MARRIED AT ANY TIME IN 2023? Y N (IF YES, PLEASE PROVIDE EITHER SPOUSE INFO BELOW OR DATE OF DIVORCE/SEPARATION):

SPOUSE INFORMATION:

LEGAL NAME: _____ SSN: _____
 ADDRESS: _____
 PHONE: _____ EMAIL: _____ DATE OF BIRTH: _____
 NAME YOU PREFER TO BE CALLED: _____ PRONOUNS: _____
 DRIVERS LICENSE #: _____ ISSUE DATE: _____ EXPIRATION: _____
 PREFERRED METHOD OF CONTACT: EMAIL PHONE

DEPENDENTS

NAME	DOB	SSN	SON/DAUGHTER/OTHER	MONTHS IN HOME

FOR CHILDREN UNDER 13, DID YOU HAVE CHILDCARE EXPENSES? Y N

*****IF YES, PLEASE FILL OUT A CHILDCARE WORKSHEET

ESTIMATED TAX PAYMENTS

IF YOU MADE ANY PAYMENTS (NOT THROUGH WITHHOLDING) TO FEDERAL OR STATE, PLEASE LIST AMOUNTS AND DATES PAID BELOW:

	DATE PAID	DATE PAID	DATE PAID	DATE PAID	total
Federal	\$	\$	\$	\$	\$
State	\$	\$	\$	\$	\$

HEALTHCARE

DID ANYONE PURCHASE INSURANCE THROUGH HEALTHCARE.GOV? Y

*****IF YES, PLEASE PROVIDE ALL 1095-A FORMS. **WE WILL NOT BE ABLE TO FILE YOUR TAX RETURN WITHOUT THIS INFORMATION**

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DID YOU HAVE ACTIVE-DUTY MILITARY PAY Y N
 ARE YOU A MILITARY RESERVISTS? Y N
 DID YOU SELL /TRADE/GIFT/RECEIVE ANY VIRTUAL CURRENCY/DIGITAL ASSESTS (SUCH AS BITCOIN, NFTs) Y N
 DO YOU HAVE ANY INTEREST OR AUTHORITY OVER ANY NON-US BANK ACCOUNT OR TRUSTS? Y N
 HAVE YOU DONE ESTATE PLANNING/HAVE A WILL OR TRUST Y N

SOURCES OF INCOME

CHECK ALL THAT APPLY

X	INCOME TYPE	X	INCOME TYPE
	WAGES (FORM W2)		UNREPORTED TIP INCOME
	INTEREST (FORM 1099-INT)		RENTAL INCOME
	DIVIDEND (FORM 1099-DIV)		SELF EMPLOYMENT/CONTRACTOR INCOME
	UNEMPLOYMENT		ALIMONY
	RETIREMENT/PENSION (FORM 1009-R)		GAMBLING/LOTTERY WINNINGS
	SOCIAL SECURITY		FOREIGN EARNINGS
	PARTNERHIP/S-CORP/TRUST (FORM K-1)		STATE TAX REFUND

INCOME—SPECIAL SITUATIONS

DID YOU SELL ANY STOCK? Y IF YES, WERE ANY SALES:
 EMPLOYEE STOCK PARTICIPATION (ESPP) SHARES? Y
 RESTRICTED STOCK UNITS (RSU--SHARES THAT VEST OVER TIME) Y
 INCENTIVE STOCK OPTIONS (ISO—SHARES YOU CAN BUY AT A GUARANTEED PRICE) Y

DID YOU SELL A HOME? Y

DID YOU HAVE INCOME FROM SELLING ITEMS ON EBAY OR THROUGH VENMO/PAYPAL/CASHAPP OR THE EQUIVALENT? Y

DID YOU RECEIVE INCOME FROM CASH OR NON-CASH SOURCES NOT ADDRESSED ABOVE? Y

IF YOU HAVE A REFUND AND WOULD LIKE DIRECT DEPOSIT, PLEASE PROVIDE YOUR BANK ROUTING AND ACCOUNT NUMBER:

ROUTING NUMBER (9 DIGITS):

ACCOUNT NUMBER

THIS ACCOUNT IS: CHECKING SAVINGS

DEDUCTIONS/ADDITIONAL INFORMATION

CHECK ALL THAT APPLY. PLEASE INDICATE IF THE DEDUCTION APPLIES TO TAXPAYER (T) OR SPOUSE (S) OR BOTH.

T	S	DO/ARE YOU:	T	S	DO/ARE YOU:
		K-12 TEACHER			OWN A HOME
		CONTRIBUTE TO AN HSA			PAY PROPERTY TAX
		HAVE HSA DISTRIBUTIONS			LIVE/WORK IN MULTIPLE STATES
		CONTRIBUTE TO AN IRA /SEP IRA (Not through an employer)			HAVE UNREIMBURSED MEDICAL EXPENSES
		PAY ALIMONY			DONATE MONEY TO CHARITY TOTAL DONATED:
		PAY COLLEGE TUITION			DONATE GOODS TO CHARITY FAIR MARKET VALUE:
		ADOPT A CHILD			MAKE POLITICAL DONATIONS
		HAVE LONG TERM CARE INSURANCE			DID YOU MAKE ANY QUALIFIED ENERGY EFFICIENT IMPROVEMENTS TO YOUR HOME?
		PUT MONEY IN THE OREGON COLLEGE SAVINGS PLAN			DONATE TO THE OREGON CULTURAL TRUST
		STUDENT LOAN INTEREST			DID YOU BUY OR SELL AN ELECTRIC/HYBRID VEHICLE

By signing this statement, I agree that the information furnished to In or Out Tax Services, Inc. for the preparation and filing of my tax return is true, correct and complete to the best of my knowledge. In or Out Tax Services, Inc’s liability is limited to paying interest or penalties due to their error, if we agree that penalties are due to our error, we reserve the right to ask for an abatement from the governing agency first. In or Out Tax Services, Inc is not responsible for interest or penalties resulting from inaccurate or incomplete information. In addition, I agree to pay an hourly fee of \$200/hour if I decline to complete my tax return with In or Out Tax Services, Inc after work has begun.

Customer Signature

Date