



Primary-Name (First, M, Last)	Date of Birth	SSN#
Spouse Name (First, M, Last)	DOB	SSN#

Address		
Phone Number		Spouse Phone number
Occupation		Spouse Occupation
Email		
Spouse Email		

Please answer all questions Circle One

- 1.** Did we do your taxes last year? (If no, if possible, it is best if you please provide a copy of last year's return.)
Yes or No
- 2. Did you receive your full refund last year?**
Yes or No
- 3.** Did you receive a letter of any type from the IRS or any state last year?
Yes or No
- 4.** Have you ever been denied Earned Income Tax Credit or had a child disallowed as a dependent on your tax return by the IRS? (IF YES PLEASE EXPLAIN)
Yes or No
- 5. Are you claiming any dependents on your tax return?**
(If so, you must provide a copy of their social security card, additional documents may be required to qualify for Earned Income Tax Credit.)
Yes or No
- 6. Virtual currency: At any time during 2019, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?**
Yes or No

- 7. Has your marital status or filing status changed during 2019?**
Yes or No
please circle your status: **married - single – divorced – widower-separated:** date of separation: _____
- 8.** Did you receive any unemployment compensation in 20__? (if yes provide 1099-G)
Yes or No
- 9.** Have you put any money into or taken any money out of any Tax deferred account during 20__? (Such as IRA's, 401K's, Pension, Annuities, 529 plan, HSA, MSA)
Yes or No
- 10.** Have you paid any daycare expenses in 2019 for a child under age 13 or a disabled spouse or other disabled dependent?
Yes or No
- 11.** Have you, your spouse or your dependents taken any college or tech school courses in 20__? (You must provide the 1098-T from the educational institution)
Yes or No
- 12.** Have you paid interest on any student loans in 20__?
Yes or No
- 13.** Have you bought, sold, or had your Home foreclosed on in 20__?
Yes or No

14. Did you sell stock, timber, real estate, or any other assets in 20__?

Yes or No

15. Did you receive Social Security benefits in 20__?

(if yes please provide your 1099-SSA form)

Yes or No

16. Did you receive any lottery winnings, jury duty pays or alimony in 20__?

Yes or No

17. For the year 2019 did you have health insurance for you and your family? (Thru either Individual Policy, Employer, Government Agency (Medicaid or State) or Health Care Market Place.

Yes or No

Our fees are based on the size, complication and forms on your tax return. These fees cannot be accurately determined until the completion of the return. However, if price is a concern, please ask the preparer for a cost estimate prior to the start of your return. The estimate will be within 10% of the final fee.

Your privacy is important to us. Read the following privacy policy.

We collect nonpublic personal information about you from various sources, including: Interviews regarding your tax situation, applications, organizers, or other documents that supply such information as your name, address, telephone number, social security number, number of dependents, income, and other tax-related data. Tax-related documents you provide that are required for processing tax returns, such as Forms W-2, 1099R, 1099-INT and 1099-DIV, and stock transactions.

We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as requested by our clients or as required by law. We restrict access to personal information concerning you, except to our employees who need such information in order to provide products or services to you. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your personal information.

Sincerely,

Baires Tax Services Administration.

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