Client Information for Tax Preparation Services

Please Include this form with your 2024 Tax preparation information to avoid any delay

Name (Print below)	**Soc.Sec No.**	**Date of Birth**	**Occupation**	**Email** (for tax return questions)
Taxpayer:				
Spouse:				
Mailing Address: Address on your tax return	**City**	**State, Zip**	**Taxpayer phone**	**Spouse phone**

Children or other Dependent to Claim on your Return:

Check one filing status Married ☐ Single ☐ HOH ☐ MFS ☐

Taxpayer is: Disabled ☐ Blind ☐

Name (First, Last)	Date of Birth MM/DD/YY	Relationship	Social Security Number	Lived With You all year?	Disabled Y/N	Full Time Student?

1. Did you receive an advance premium from the Marketplace for health insurance?Yes ☐ (1095-A required) No ☐

Please answer all questions below:

Questions for 2024	**Yes or No**	**Questions for 2024**	**Yes or No**
Any births, deaths, adoption, marriage, separation or divorce in your household?		Did you make contributions to a 529 Education savings account owned by you for the benefit of a child or grandchild? **Provide year end statement**.	
Any Energy Efficient improvements on your home? Provide documentation.		Did you pay interest on a student loan for you or a dependent during the year? Need **1098-E**	
Did you buy, refinance or sell your home or any other real estate? **If, Sale** : Provide the **settlement statements** (for purchase and sale} and **1099-S for the sale.**		Did you pay tuition expenses for anyone in your home for classes beyond high school? Provide **1098-T** for education tax credit	
Any sale of stocks or mutual funds in a non- retirement account? Need**1099-B**		Did you have any debts cancelled and received a **1099-C**?	
Do you receive rent from real estate or other property? **1099-Misc**		Did you receive any unemployment benefits? Need **1099-G**	
Did you contribute to a Health Savings Account (HSA) or take distributions? You must provide the **1099-SA and 5498-SA**(Download from on-line acct)		If you plan to itemize deductions on **SCH A**: provide receipts for donations, mortgage interest, real estate taxes, personal property tax, sales tax on large purchases. **Form 1098**	
Did you pay for childcare, preschool, day camp? Need **provider Name, EIN, address**		Did you buy or sell bitcoins or crypto currencies? Sales must be reported just like stock sales (**1099-B**)	
Received interest or dividend income? provide **1099-Int and 1099-DIV**		Social Security Income? provide **SSA-1099**	
Did you work or sell goods and received a **1099-K** from Uber, TaskRabbit Etsy, Airbnb, Freelancer, Paypal, Ebay, Amazon? Provide **1099-K** and explanation as needed		Are you an "eligible educator" with out-of-pocket qualifying expenses (fees and materials books, school supplies, computer equipment, software, services, etc.) used in the classroom?	

Client Information for Tax Preparation Services

Did you make Estimated Payments? If you did, please complete the following:

	Federal Date and Amount		**State** Date and Amount	
First quarter payment				
Second quarter payment				
Third quarter payment				
Fourth quarter payment				

Please indicate if you would like your refund sent by mail or through direct deposit (faster).

Send my refund by mail ☐

Send my refund by Direct Deposit and use the account information below:

Type of account: checking ☐ Savings ☐

Bank routing number:______________________________

Bank account number:______________________________

When your Tax return is ready, we will contact you by phone or email:

Select the format(s) you would like for your Tax Return Client Copy?

Printed Client Copy ☐ PDF Client Copy sent by encrypted email ☐ or by Verifyle ☐

All returns will be filed electronically due to mandatory e-file requirements.

Payment for our services and signed e-file authorizations are required prior to filing of your returns.

Please indicate any specific questions or explanation for the data provided to us for your tax return preparation:

.

Thank you for choosing Massanutten Financial Services for your tax preparation.
Please visit our website for this year's tax updates and the newest tax bracket tables

101 Warren Street, Elkton, VA 22827 ◆ Voice (540) 298-0644 massanuttenfinancial.com
◆ megan@mfsinc.pro ◆ lise@mfsinc.pro ◆ gail@mfsinc.pro ◆