



2020 Client Data Sheet/Fax Cover Sheet
FrontDesk@JTaxes.net Fax 1-800-511-9893

How would you like to receive your tax return when completed? (Circle one) E-Mail, Mail, Pick Up

Taxpayer Name: _____		Social Sec. #: _____	
Date of Birth: _____	E-Mail Address: _____		
Spouses Name: _____	Date of Birth: _____	Social Sec. #: _____	
Address: _____	City: _____	State: _____	Zip Code: _____
Phone Numbers/Home: _____	Cell (T): _____		Cell (S): _____

Prefer to be contacted for questions or results by: Phone / Text / Email (Circle One)

Dependent Name	Date of Birth	Social Security #	Relationship

Taxpayer's Driver's License #: _____ Issue Date: _____ Expiration Date: _____

Spouse's Driver's License #: _____ Issue Date: _____ Expiration Date: _____

Stimulus Payment Received? Fill in amount received: 1st (April 2020): \$ _____ 2nd (Jan. 2021) Amount: \$ _____

Did you receive Unemployment Compensation? (Y / N) (Please provide 1099(s).)

Did you move/change address in 2020? (Y / N) What date did you move/change? _____

Did you pay any estimated taxes? (Y / N) How much? Federal: _____ State: _____ City/SD : _____

Do you have a Health Savings Account (HSA)? (Y / N) Please provide 1099SA Form.

Did you or your dependents go to college? (Y / N) Please provide 1098T and any 1099Q forms.

Do you have Child/Daycare expenses? (Y / N) Total paid? _____ Provide statement with Name, ID, Etc.

Did you make any cash donations to charity up to \$300? If so, what amount? \$ _____

Do you have self-employment/business income or rental property? (Y / N)

Are you interested in a Direct Deposit of your refund? (Y / N) Checking or Savings (Circle One)

Bank _____ Routing # _____ Account # _____

Credit card information to charge your tax preparation fee once return is complete:

CC #: _____ Expiration Date: ____/____/____ 3 Digit Code: _____

Other Comments: _____

Loveland Office: 10920 Loveland Madeira Road Ste 2A, Loveland, Ohio 45140 (513) 683-9252

West Chester Office: 8240 Beckett Park Drive, Ste B, West Chester, Ohio 45069 (513) 373-9900