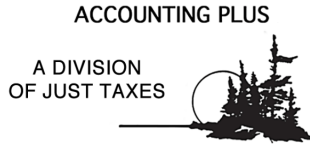




Tax & Accounting Services



2021 Client Data Sheet/Fax Cover Sheet
FrontDesk@JTaxes.net Fax 1-800-511-9893

Form with fields: Taxpayer Name, Social Sec. #, Date of Birth, E-Mail Address, Spouse Name, Date of Birth, Social Sec. #, Address, City, State, Zip Code, Phone Numbers/Home, Cell (T), Cell (S)

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

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

Table with 4 columns: 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:

Did you receive the \$1400 March Stimulus Payment (Form 1444-C)? (Y / N) Fill in amount received: \$

Did you receive Advance Child Tax Credit payments (Form 6419)? (Y / N) Fill in total amount received: \$

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

Did you move/change address in 2021? (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? 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