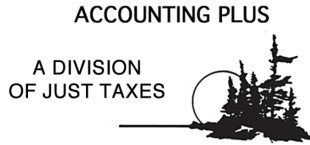




Tax & Accounting Services



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

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

Maineville Office: 7264 Columbia Road Ste 100, Maineville, Ohio 45069 (513) 336-8588

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