



Tax & Accounting Services

ACCOUNTING PLUS

A DIVISION OF JUST TAXES



# 2022 Client Data Sheet

FrontDesk@JTaxes.net Fax 1-800-511-9893

Taxpayer Name:		Spouse Name:		
Date of Birth:		Date of Birth:		
Social Sec. #:		Social Sec. #:		
Address:		City:	State:	Zip Code:
Phone Number (T):		Phone Number (S):		
Email Address:				

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

Dependent Name (First and Last)	Social Security #	Date of Birth	Relationship

Taxpayer's Driver's License #: \_\_\_\_\_ Issue Date: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Spouse's Driver's License #: \_\_\_\_\_ Issue Date: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Did you move/change address in 2022? ( 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 charitable contributions this year? ( Y / N ) Please provide a Cash and Non-Cash value

Cash Total \$ \_\_\_\_\_ Non-Cash Total \$ \_\_\_\_\_ No Receipts Needed

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