

SUMMIT TAX AND ACCOUNTING LLC CLIENT INTAKE FORM 2023

2023 TAXPAYER INFORMATION – **AN EMAIL ADDRESS FOR EACH TAXPAYER IS NEEDED!**

TAXPAYER NAME: _____ DOB: _____ EMAIL: _____

SPOUSE NAME: _____ DOB: _____ EMAIL: _____

CURRENT ADDRESS: _____ CELL PH: _____

CITY, ST, ZIP _____ HOME/WK/ALT PH: _____

WHO SHOULD WE CALL WHEN READY? _____ BEST TIME TO CALL _____

WHEN COMPLETE DO YOU PREFER ELECTRONIC COPIES/SIGNING TO AVOID A 2ND TRIP ---- YES ____ OR NO ____

DATE YOU NEED COMPLETED BY: _____ DATE DROPPED OFF: _____

DO YOU NEED A RUSH? _____ PLEASE LET US KNOW UPFRONT AS ADDL FEES MAY APPLY

NORMAL PROCESSING: PLEASE ALLOW 7-14 WORKING DAYS TO COMPLETE RETURNS AND BE PATIENT SHOULD IT TAKE LONGER AS EACH PERSONS SITUATION IS DIFFERENT AND DUE TO CIRCUMSTANCES OUT OF OUR CONTROL IT MAY TAKE LONGER OR LESS TIME TO COMPLETE.

DEPENDENTS (NOT THE TAXPAYER OR SPOUSE) YOU ARE CLAIMING, PLEASE LIST EVEN IF SAME AS LAST YEAR:
(YOU MUST PROVIDE A SOCIAL SECURITY CARD FOR NEW DEPENDENTS)

NAME	BIRTHDATE MM/DD/YY	COLLEGE STUDENT	IF DEPENDENT WORKED A JOB PLEASE GIVE DETAILS AND PROVIDE W-2 FORMS, WE CAUTION AGAINST A CHILD FILING THEIR OWN TAX RETURN WITHOUT CONSULTING PARENTS – THIS CAN COST YOU!!

DID YOU HAVE INSURANCE COVERAGE THROUGH HEALTHCARE.GOV? YES ____ NO ____

IF YES WE NEED YOUR 1095-A FORM(S)

DID YOU BUY OR SELL ANY CRYPTOCURRENCY (BICOIN, ETHEREUM, ETC) YES ____ NO ____

DO YOU OWN A BUSINESS OR FARM? YES ____ NO ____ IF YES ARE YOU AN LLC OR INC? YES ____ NO ____

PEASE TELL US ABOUT ANY CHANGES TO YOUR SITUATION FROM 2022, OR ANY QUESTIONS YOU NEED ANSWERED SO WE CAN CONTACT YOU FOR MORE DETAILS, WE ARE HERE TO ADVISE:

DON'T FORGET TO TELL US IF YOU WERE ON JURY DUTY, HAD A CANCELLATION OF DEBT, OR TOOK A DISTRIBTUION FROM IRA/401-K EVEN IF TAXES WERE WITHHELD.

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DEDUCTIONS SUMMARY FOR _____ YEAR 2023

PLEASE TOTAL YOUR ITEMS AND PROVIDE A SUMMARY SHEET, FOR YOUR CONVENIENCE ONE IS ATTACHED!

IN ORDER TO ITEMIZE DEDUCTIONS THESE MUST ADD UP TO BE MORE THAN THE STANDARD DEDUCTION

MEDICAL EXPENSES:

DOCTORS/DENTIST/RX _____
INSURANCES – NOT PRE TAX _____
OTHER MEDICAL _____
MILEAGE TO DR/RX-PROVIDE # OF MILES _____

ALL MEDICAL EXPENSES INCLUDING, DOCTOR, DENTIST, HOSPITAL, CHIROPRACTOR, EYE GLASSES & CONTACTS, HEARING AIDS, DENTURES, PRESCRIPTIONS (NOT-OVER THE COUNTER MEDS), MEDICAL, ACCIDENT, VISION, AND CANCER INSURANCE PAID AFTER TAX. NURSING CARE, AND AT HOME CARE CAN ALSO QUALIFY. WALKING CANES, PROSTHETICS AND BRACES SHOULD BE INCLUDED.

LONG TERM CARE (NURSING HOME) INSURANCE IS DEDUCTIBLE BASED ON YOUR AGE, PLEASE PROVIDE THE AMOUNT PAID FOR EACH PERSON COVERED. THIS DEDUCTION IS ALLOWED BASED ON THE AGE OF THE INSURED PERSON.

TAXES:

REAL ESTATE PROPERTY TAX _____
VEHICLE/ATV/BOAT/MTRCYCL _____
ANY OTHER TAXES (DETAIL) _____

TAXES PAID TO STATE, AND COUNTY INCLUDING PROPERTY TAXES ON HOME AND VEHICLES, BOATS, MOTORCYCLES, RV'S AND OTHER PERSONAL PROPERTY.

MORTGAGE INTEREST – PROVIDE FORM 1098 _____

DONATIONS:

CHURCH/CHARITY/UNITED WAY _____
NON-CASH (GOODWILL/SALVATION ARMY) _____
OTHER _____

DONATIONS TO CHURCHES AND CHARITIES IN CASH, ALSO DONATIONS OF PROPERTY SUCH AS CLOTHING, OR HOUSEHOLD ITEMS, ETC. PLEASE PROVIDE A VALUE AND LIST ALONG WITH THE RECEIPT FROM THE CHARITY. MILEAGE FOR CHARITABLE WORK SUCH AS DELIVERING MEALS ON WHEELS, ETC. YOU ARE REQUIRED TO HAVE THE RECEIPT FOR YOUR DONATION IF AUDITED, PLEASE LIST EACH CHARITY AND TOTAL.

CHILD DAYCARE EXPENSE – PROVIDE STMT/RECEIPT - WE MUST HAVE THE PROVIDERS ADDRESS AND TAX ID TO CLAIM A CREDIT.

STUDENT LOAN INTEREST – PROVIDE FORM 1098-E _____

ENERGY CREDIT – NO CREDIT FOR ROOFS IN 2023

WINDOWS _____ DOORS _____ HVAC _____ INSULATION _____
ENERGY AUDIT _____ PANEL BOX _____ OTHER/NOTES _____

TAX CREDITS- THE ENERGY TAX CREDITS ARE AVAILABLE FOR 2023, THERE IS A CREDIT FOR INSULATION, DOORS, WINDOWS AND SKYLIGHTS, HEAT PUMPS, IMPROVEMENTS TO PANELBOXES AND HOME ENERGY AUDITS.

PLEASE PROVIDE US WITH THE TYPE AND TOTAL COST OF THE IMPROVEMENT YOU MADE.

COLLEGE EXPENSE – PROVIDE FORM 1098-T

STUDENT NAME _____ DRUG CONVICTION? YES ___ NO ___
WHAT YEAR IN COLLEGE 2022 _____ AT LEAST ½ TIME? YES ___ NO ___
NAME OF COLLEGE _____
COST OF BOOKS/SUPPLIES (NOT HOUSING/TRAVEL/MEALS) _____

COLLEGE EXPENSES- WE MUST HAVE FORM 1098-T FROM THE COLLEGE AS WELL AS THE TOTAL OF BOOKS AND SUPPLIES FOR THE YEAR. THE INFORMATION IS NEEDED EVEN IF THE TUITION WAS PAID BY GRANT OR LOAN. WE ALSO NEED TO KNOW WHO PAID THE EXPENSES. IF AN EDUCATION SAVINGS ACCT WAS USED PROVIDE 1099-Q.

CONTACTLESS OPTION/SECURE PORTAL UPLOAD/SAVE A TRIP!

YOU CAN CHOOSE TO SCAN AND UPLOAD ALL OF YOUR INCOME DOCUMENTS, ANY OTHER OFFICAL TAX DOCUMENTS AND A SUMMARY OF YOUR DEDUCTIONS. WITH YOUR EMAIL ADDRESS WE CAN SETUP A PORTAL ACCOUNT FOR YOU OR YOU CAN SETUP YOUR OWN BY GOING TO <https://summittaxandaccounting.securefilepro.com/portal#/login> AND UPLOAD USING GUEST EXCHANGE, WE WILL BE NOTIFIED AND GET TO WORK ON YOUR FILES. IF YOU HAVE ANY ISSUES PLEASE CONTACT OUR OFFICE AT 336-223-4436 OR EMAIL JULIE@SUMMITTAXANDACCOUNTING.COM. IF YOU PROVIDE US AN EMAIL ADDRESS FOR EACH TAXPAYER WE CAN SEND YOUR SIGNATURE PAGES ELECTRONICALLY TO YOU FOR SIGNATURE AND PROVIDE YOU AN ELECTRONIC COPY OF YOUR TAX RETURN SECURELY. WE WILL INVOICE YOU AND YOU CAN PAY US ONLINE WITHOUTH HAVING TO VISIT OUR OFFICE.