

Boized Books & Accounting LLC	
1040 Tax Client Intake Form	
Please Provide the Following:	Social Security Cards or ITIN letters for everyone on tax return Picture ID for Taxpayer and Spouse Tax Forms: W-2, 1099, 1098, K-1, 1095, ect.

Taxpayer		Spouse	
SSN		SSN	
First		First	
Middle		Middle	
Last		Last	
U.S. Citizen		U.S. Citizen	
Email		Email	
Occupation		Occupation	
Legally Blind		Legally Blind	
Dependant		Dependant	
Permanently Disabled		Permanently Disabled	
Full-time Student		Full-time Student	
Date of Birth		Date of Birth	
Date of Death		Date of Death	
Phone		Phone	

Filing Status (check one)		Address	
Single		Street	
Married Filing Joint		City	
Married Filing Single		State	
Head of Household		Zip	
Qualifying Widower		County	

Dependents					
First	MI	Last	SSN	Relationship	

**Agreement**

This agreement is between you, hereafter "Client" and Boized Books & Accounting LLC, hereafter "Boized". Boized agrees to prepare income tax returns, to the best of its ability, with the information they are given by the client in exchange for a fee agreed upon by both parties. This fee does not include tax return amendments or audit support. We are not CPA's, EA's or participants in the IRS Annual Filing Season Program, therefore we generally cannot represent your interests before the IRS.

x \_\_\_\_\_ x \_\_\_\_\_

Date:

Date:

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Income (check)		Expenses (check)	
Wages or Salary (W-2)		Alimony	
Tips		IRA	
Scholarships		401K	
Interest / Dividends (1099-INT, 1099-DIV)		Roth IRA	
Alimony		College / Trade School (1098-T)	
Self-Employment Income (1099-MISC, 1099-NEC)		Medical & Dental (including ins premiums)	
Stocks, Crypto Currency or Real Estate		Mortgage Interest (1098)	
Disability (Insurance, workers' comp)		Charitable Contributions	
Retirement Income		Child Care	
Unemployment (1099-G)		Educator Supplies	
Social Security or Railroad Retirement Benefits		Self-Employment Income Expenses	
Rental Property		Student Loan Interest (1098-E)	
Schedule K-1		Itemize?	
Any other income? (Specify)			

Other Events	
Health Savings Account	
Forgiven Debt or Home Forclosure	
Adopt a Child	
EIC, Child Tax Credit or AOC disallowed in prior year	
Purchase and Install Energy-Efficient home Items	
Receive First Time Homebuyers Credit in 2008	
Make Estimated Tax Payments (How Much?)	
File Federal Return Last Year with a "Capital Loss Carryover" on 1040 Sch D	
Have Health Coverage through the Marketplace (1095-A)	
Receive Economic Impact Payment	