

TJ MARSHALL TAX SERVICE, INC.

CUSTOMER DATA SHEET

404-965-2990 office

470-800-7030 efax

Email: tjmtaxes@gmail.com

website: tjmtaxes.com

REFERRED BY (Last Name, First Name) _____

Were you a client of TJ Marshall Tax Service, Inc. last year or prior years? **YES OR NO**

*PRIMARY NAME _____ *SSN _____ *BIRTHDATE _____

OCCUPATION _____ E-MAIL ADDRESS _____

ADDRESS _____ CITY, STATE, ZIP CODE _____

*PHONE (Work) _____ (Home) _____ (Cell) _____

*SPOUSE NAME _____ *SSN _____ *BIRTHDATE _____

OCCUPATION _____ E-MAIL ADDRESS _____

*PHONE (Work) _____ (Home) _____ (Cell) _____

Dependent's Name (first, initial and last name)	Social Security Number	Relationship	Date of Birth (MDY)

Please check all of items that are applicable to the primary or spouse of the return.

- Have you applied for Obama Care/Health Care?**
- Are you a homeowner?
- Do you have unreimbursed employee expenses?
- Do you own a business? ___ Yes ___ No ___ If Yes What the entity type (Circle)= C-Corp S-Corp, Single Member LLC, Partnership, or Sole Proprietor
- What is the Tax ID # _____ - _____
- Company Name _____
- Are you active Military?
- Do you own rental property?(Address Please)
- Do you have educational expense?

NEW Tax Credits 2021-2022

What was the amount of the advance Child Tax Credit payments from Letter 6419 (300 per month per child under 6-350=2,100/over 6 -250=1,500 per month per child _____)

Number of qualifying children taken into account to determine advance amount from the 6419 Letter # _____

RRC (Recovery Rebate Credit)

What is the amount if any of the Third Economic Stimulus Payment the taxpayer received? This was generally received in March 2021. You can find this amount on IRS notice 1444-C or IRS Letter 6475 Ex. (Single No dependents-1400, Taxpayer plus 1 child-2800, Taxpayer plus 2 children 4200, Taxpayer plus 3 children 5600) _____

Direct Deposit Information

1)Bank _____ Routing# _____ Account # _____ Ckg or Svg

Driver's License # _____ Issue Date _____ Exp _____

I attest that all information that is given on this data sheet and to the preparer is true and accurate to the best of my knowledge and is subject to possible IRS or State review. I understand that I am solely responsible for all fees which are due at the time of service no later than 60 days after transmission of information to the IRS. We will take necessary steps required to collect outstanding debts.

X _____
Primary's Signature

Date

(Turnover)

X _____
Spouse's signature

Date

PERSONAL DATA

- Social Security Cards (including self, spouse, & dependents)
- Driver's License or ID Card
- Child Care Provider: Name, Address, Tax ID# or SSN, & Amount Paid
- Education Expense: 1098T

EMPLOYMENT & INCOME DATA

- W-2 forms for this year
- Unemployment compensation: Form(s) 1099-G
- Miscellaneous income including rent: Form(s) 1099-MISC
- Pensions and Annuities: Form(s) 1099-R
- Social Security Benefits: Form(s) SSA 1099
- Partnerships & S Corporations: Schedule K-1
- State and Local Income Tax Refunds: Form(s) 1099-G
- Gambling and Lottery winnings: Form W-2G
- Interest Income: 1099 INT
- Dividend Income: 1099 INT
- Proceeds from Stocks: 1099-B
- Sale of Home Income (Loss): 1099-B
- Cancellation of Debt: 1099-C
- Bankruptcy: 1099-A
- Tip / Other Income

ITEMIZED DEDUCTIONS

- Mortgage Interest Statement: Form(s) 1098
- Real Estate Taxes Paid
- Personal Property Taxes: Ad Valorem
- Charitable Donations
- Church Tithes & Offering
- Unreimbursed Job Expenses
- Unreimbursed Medical Expenses
- Current year settlement statement (purchase of new home/refinance)

ADJUSTMENTS

- Student Loan Interest Paid
- IRA Contributions
- Early Withdrawal Penalties
- Moving Expenses
- Tuition and Fees

SELF-EMPLOYMENT DATA

- Business Income: Form(s) 1099 MISC and/or own records
- Partnership Income: Schedule K-1/Corporation income
- Business-related expenses: receipts and other documents
- Employment taxes & other estimated business taxes paid for current tax year
- Tax ID number or Incorporation papers