# MAX TAX INCOME TAX

## TAXPAYER INFORMATION SHEET

New client intake starter | Complete applicable fields

**SECURITY: Do not email this completed sheet or tax records. Ask Max Tax for secure submission instructions.**

## TAXPAYER AND SPOUSE

**Tax year**

**Taxpayer legal name**

**Spouse legal name (if applicable)**

**Street address**

**City**

**State**

**ZIP code**

**Phone number**

**Email address**

**Taxpayer SSN or ITIN (as directed)**

**Date of birth**

**Spouse SSN or ITIN (if applicable)**

**Spouse date of birth (if applicable)**

## FILING PROFILE

**Filing status for prior year (check one)**

- ☐ Single
- ☐ Married filing jointly
- ☐ Married filing separately
- ☐ Head of household
- ☐ Qualifying surviving spouse

**Do you expect the same filing status this year?** ☐ Yes ☐ No

## DEPENDENTS

| Name | Date of birth | SSN/ITIN | Months in home |
|---|---|---|---|
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## INCOME, BUSINESS & RECORDS

Use this page to note what may apply to your return

### INCOME SOURCES - CHECK ALL THAT APPLY

- ☐ W-2 wages
- ☐ 1099-NEC / freelance
- ☐ 1099-K / payment apps
- ☐ Interest / dividends
- ☐ Unemployment
- ☐ Social Security / retirement
- ☐ Rental income
- ☐ Investments / property sold
- ☐ Other income

**Other income notes (do not include account numbers)**

### SINGLE-MEMBER LLC OR SELF-EMPLOYMENT

**Do you have business income or expenses to report?** ☐ Yes ☐ No

**Business / LLC name**

**Business activity**

**Business start date (if new)**

**EIN (if applicable)**

### RECORDS TO GATHER - CHECK WHAT YOU HAVE

- ☐ Prior-year tax return
- ☐ W-2 / 1099 forms
- ☐ Business income summary
- ☐ Expense receipts / totals
- ☐ Mileage log
- ☐ Equipment / asset records
- ☐ Dependent / care records
- ☐ Education / student loan forms
- ☐ Health insurance / HSA records
- ☐ Mortgage / property tax
- ☐ Charitable gifts
- ☐ Other supporting records

### QUESTIONS OR NOTES FOR YOUR APPOINTMENT

This intake sheet helps organize your first conversation. Your tax preparer may request additional records.