

J-tax-S Inc.

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We want to start by thanking you for taking the time to fill out the many forms required for us to complete your tax return, we know this can be an annoyance, but we do appreciate it.

These forms will be a yearly occurrence so that we can reverify your information and keep our records up to date. In accordance with IRS standards and policies, J-tax-S, Inc. is now required to ask the majority of these questions before we can begin to process your tax return. If we do not ask these questions and stay in compliance, we can personally be fined \$540 per credit/per person. If you do not complete these forms and we must take the time to ask these questions to complete these forms an additional form fee/prep fee will be added to your invoice, so please do us both a favor and complete all the forms that pertain to you and your situations.

Not all forms will apply to you, please see which forms apply and only fill those out.

Documents we are required to have for everyone are...

(*Prior clients* these items may already be on file)

Driver's License, State ID, or Passport for taxpayer and spouse

Social Security Cards for each person on return

Birth Certificate for newborn children, children with different last names, and children who are being claimed by a non-parent

Client Worksheet – Must be filled out by everyone

Dependent Worksheet – Must be filled out by anyone who has a dependent on their return, if the questions are not answered the same for all children, please fill out additional forms as needed for each child's circumstances.

Head of Household Worksheet – Must be unmarried (or considered unmarried) and provide more than half the cost of keeping up a home for the year for a qualifying person (child/adult dependent)

Business/Self-Employment Income Form – Own a business, have self-employment income, received a 1099NEC or 1099MISC

Rental Property Income Form

Farm Income/Expenses Form

Higher Education Form (1098T) – Higher Education Expenses for you or a dependent, Please complete one form for each person who had Higher Education Expenses

7216 Disclosure and Consent – To give consent to disclose tax information to third parties (examples: anyone 18 or older must complete for parents to discuss info, Mortgage Companies)