

Moore's Income Tax Service Intake/ Interview Sheet 2023 Tax Year



- In addition to this form, you will need to provide:
 - Tax forms such as W-2, 1099,1098,1095.
 - Social Security cards or ITIN letters for all persons on the tax return.
 - Unexpired picture ID card (such as driver's license) for you and your spouse.
- Ensure you complete pages 1-3 of this form.
- You are responsible for the information on this return. Please provide complete and accurate information.
- If you have questions, please ask your preparer.

Part 1- Your Personal Information (If you are filing a joint return, enter your names in the same order as last year's return.)

<u>Your First Name</u>	<u>M.I.</u>	<u>Last Name</u>	<u>Best Contact Number</u>	<u>Email Address</u>		<u>SSN #</u>
						US Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No
<u>Your Spouse First Name</u>	<u>M.I.</u>	<u>Last Name</u>	<u>Best Contact Number</u>	<u>Email Address</u>		<u>SSN #</u>
						US Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No
<u>Mailing Address</u>			<u>Apt #</u>	<u>City</u>	<u>State</u>	<u>Zip code</u>
<u>Your Date of Birth</u>	<u>Your Job Title</u>		<u>Last year were you:</u>			
			a. Full Time Student	<input type="checkbox"/> Yes <input type="checkbox"/> No		
			b. Totally and permanently disabled	<input type="checkbox"/> Yes <input type="checkbox"/> No	c. Legally blind	<input type="checkbox"/> Yes <input type="checkbox"/> No
<u>Your Spouses Date of Birth</u>	<u>Your Spouses Job Title</u>		<u>Last year was your spouse:</u>			
			a. Full Time Student	<input type="checkbox"/> Yes <input type="checkbox"/> No		
			b. Totally and permanently disabled	<input type="checkbox"/> Yes <input type="checkbox"/> No	c. Legally blind	<input type="checkbox"/> Yes <input type="checkbox"/> No
<u>Can anyone claim you or your spouse as a dependent?</u> <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure						
<u>Have you, your spouse or dependents been a victim of tax related identity theft or been issues an Identity Protection PIN?</u> <input type="checkbox"/> Yes <input type="checkbox"/> No Provide PIN to your preparer.						

Part 2- Marital Status and Household Information: As of December 31, 2023, what was your marital status?

Never Married (This includes registered domestic partnerships, civil unions, or other formal relationships under state law)
 Married a. If yes, did you get Married in 2023? Yes No b. Did you live with your spouse during any part of the last six months of 2023? Yes No
 Divorced Date of Final decree _____
 Legally Separated Date of separate maintenance decree _____
 Widowed Year of Spouses death _____

What was your 2022 Filing Status:

Single Married Filing Jointly Married Filing Separately Head of Household Qualifying Widower

Private Sensitive information of Moore's Income Tax Service, LLC – All Rights Reserved
NOT TO BE SHARED OR COPIED WITHOUT WRITTEN APPROVAL FROM MANAGEMENT

Taxpayers Last Name _____

Last 4 of Social _____

List the names below of: **Everyone** who lived with you last year (other than your spouse). **Anyone** who you supported but did not live with you last year.

Name (First, Last) <i>Do not enter your name or spouse name</i>	DOB	SSN	Relationship (Son/ Daughter, Parent, None etc.)	Number of months lived in your home last year or provided support.	US citizen (Yes/ No)	Resident of US Canada or Mexico last year (Yes/No)	Single or Married as of 12/30/23 (Yes/No)	Full Time Student last year (Yes/No)	Totally and Permanently Disabled (Yes/No)

Check appropriate box for each question in each section.

Yes	No	Unsure	Part 3- Income- Last Year, Did You (or Your Spouse) Receive
			Wages or Salary? Form W-2. If yes how many jobs did you have last year? _____
			Tip Income
			Scholarships (Forms W-2, 1098T)
			Interest/Dividends from check/savings accounts, bonds, CD's brokerage? (Forms 1099-INT, 1099-DIV)
			Refund of state and local income taxes? Form 1099-G
			Alimony income or separate maintenance payments?
			Self-employment income? Form 1099-MISC, 1099-NEC, cash, virtual currency or other property or services
			Cash/check/virtual currency payments or other property or services for any work performed not reported on Forms W-2 or 1099?
			Income (or loss) from the sale or exchange of Stocks, Bonds, Virtual Currency or Real Estate (Including your home) (Forms 1099-S, 1099-B)
			Disability Income? (Such as payments from insurance or workers compensation) (Forms 1099-R, W-2)
			Retirement Income or payments from Pensions, Annuities, IRA? (Form-1099-R)
			Unemployment compensation? (Form 1099G)
			Social Security or Railroad Benefits? (Forms SSA-1099, RRB-1099)
			Income (or loss) from Rental Property
			Other Income (gambling, lottery, prizes, awards, jury duty, virtual currency, Sch K-1, royalties, foreign income, other property, or services, etc. Please specify: _____)
Yes	No	Unsure	Part 4- Expenses- Last Year, Did You (or Your Spouse) Pay
			Alimony or separate maintenance payments? If yes do you have the recipients SSN? <input type="checkbox"/> Yes <input type="checkbox"/> No
			Contributions to a retirement account? <input type="checkbox"/> IRA <input type="checkbox"/> 401K <input type="checkbox"/> Roth IRA <input type="checkbox"/> Other

**Private Sensitive information of Moore's Income Tax Service, LLC – All Rights Reserved
NOT TO BE SHARED OR COPIED WITHOUT WRITTEN APPROVAL FROM MANAGEMENT**

Taxpayers Last Name _____

Last 4 of Social _____

			College or post-secondary educational expenses for yourself or your dependents? (Form 1098-T)
		<input type="checkbox"/>	Any of the following? <input type="checkbox"/> Medical and Dental (including insurance premiums) <input type="checkbox"/> Mortgage Interest (Form 1098)
		<input type="checkbox"/>	<input type="checkbox"/> Taxes (State, Real Estate, Personal Property, Sales) <input type="checkbox"/> Charitable Contributions
			Child or dependent care expenses such as daycare?
			For supplies used as an eligible educator such as a teacher, teacher's aide, counselor, etc.?
			Expenses related to self-employment income or any other income you received?
			Student loan interest? (Form 1098-E)
Yes	No	Unsure	Part 5- Expenses- Life Events- Last Year, Did You (or Your Spouse)
			Have a Health Savings Account? (Form 5498-SA, 1099-SA, W-2 with a code W in box 12)
			Have a credit card or mortgage debt cancelled or forgiven by a lender or have a home foreclosure? (Forms 1099-C, 1099-A)
			Adopt a child?
			Have Earned Income Credit, Child Tax Credit or American Opportunity Credit disallowed in prior year? If yes for which tax year? _____
			Receive the First Time Home Buyers Credit in 2008?
			Make estimated tax payments or apply last year's refund to this year's tax? If so, how much _____
			File a federal return last year containing a "capital loss carryover" on Form 1040 Schedule D?
			Have health coverage through the Marketplace (Exchange)? Provide Form 1095-A

Additional Information and Questions Related to the Preparation of Your Return

Presidential Election Campaign Fund (If you check a box, your tax or refund will not change) Check here if you, or your spouse if filing jointly, want \$3 to go to this fund You Spouse
If you are due a refund, would you like direct deposit? Yes No PROVIDE VOIDED CHECK LAST 4 OF ACCOUNT IF PROVIDED LAST YEAR _____
Do you live an area that was declared a federal disaster area? Yes No If yes where? _____
Did you, or your spouse if filing jointly receive a letter from the IRS? Yes No Provide letter to your preparer.

Did Preparer Complete This Form? Yes No Preparer Name: _____

Additional Comments Reference the Return: _____

Please sign certifying that all the information on this document is accurate. Taxpayer _____ Spouse _____ Date: _____

Private Sensitive information of Moore's Income Tax Service, LLC – All Rights Reserved
NOT TO BE SHARED OR COPIED WITHOUT WRITTEN APPROVAL FROM MANAGEMENT