

Curran's Tax Service

rod@curranstax.com 765.362.2522
fax 765.362.1482 2106 Indpls Rd, Crawfordsville IN 47933

CLIENT INFORMATION SHEET

TAX YEAR 2023

PAGE 1

YOUR INFORMATION

Your Full Name	Social Security Number	Birth Date	Occupation in 2023
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

SPOUSE'S INFORMATION

Spouse's Full Name	Social Security Number	Birth Date	Occupation in 2023
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

ADDRESS & CONTACT INFORMATION

Address	City	State	Zip
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Best Phone	Best time to call	Email Address	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

County of Residence January 1, 2023

Please provide DL for ease in State filings and identity protection.

US Citizen/Resident Alien/Non-res. Alien
Please Circle That Which Applies

FILING STATUS

Marital status at the end of 2023

Single Married Divorced: year _____

If married, did you live apart from your spouse during the last 6 months of 2023?

Yes No

By answering "Yes," you are confirming that if requested by the IRS, you can provide documentation that verifies your spouse did not live with you during the last 6 months of the year, such as a lease agreement, utility bills, a letter from a clergy member, or a letter from social services.

Can you be claimed as a dependent on someone else's tax return?

Yes No

Did you pay for over half the cost of keeping up your home during 2023?

Yes No

Upkeep expenses include rent, utilities, food eaten in the home, mortgage interest, real estate taxes, and insurance on the home. If you use payments you received under any public assistance program to pay for part of the cost of keeping up your home, you cannot count them as money you paid. However, you must include them in the total cost of keeping up your home to figure if you paid over half the cost.

By answering "Yes," you are confirming that if requested by the IRS, you can provide documentation that verifies you paid for over half the cost of keeping up your home, such as rent receipts, utility bills, grocery receipts, and other household bills.

DEPENDENTS

First Name	Last Name	Birth Date	Social Security Number	Relationship to You	# Months Lived with You 2023	Claiming for 2023 ?

If requested by the IRS, can you provide documentation that shows evidence of the relationship between you and each of your dependents listed above (birth certificates, marriage certificates, court documents, letters from authorized placement agencies, etc.)?

Yes No

If requested by the IRS, can you provide evidence that each of your dependents lived with you for the number of months stated above during 2023 (school, medical, childcare provider, social service records, etc.)?

Yes No I have daycare expenses Care provider name & Fed ID #

If you are claiming a dependent child on your tax return, in order for us to meet certain requirements set forth by the IRS, you are required to accurately and thoroughly answer all questions listed below. If applicable, be sure to provide a detailed explanation for each child you are claiming. Your tax preparer will review each question that pertains to your situation during the preparation of your tax return.

Are you claiming a child who was between 19 and 23 years of age at the end of 2023 and a full-time student for any part of five calendar months during 2023? If yes, please list the educational institution and the months attended by the child as a full-time student.

<input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes", which ones? _____ Year in College (Freshman, Sophomore, etc) 1098T req.	Was a student convicted of a felony for possession or distribution of a controlled substance in 2023? <input type="checkbox"/> Yes <input type="checkbox"/> No
--	---

Are you claiming a child who is permanently and totally disabled? If requested by the IRS, can you provide documentation that verifies the child is permanently and totally disabled, such as a note from a doctor, healthcare provider, or social service program?

Yes No

Did any of the dependents you are claiming earn more than \$4200 in wages in 2023?

Yes No If "Yes", which ones?

Can anyone else claim any of your dependents? * Indicate if someone else can claim any of your dependents for Earned Income Credit

Yes No If "Yes", which ones? Will they try to claim this dependent? Yes No

Are you claiming a child who lived with any other adult relative, including other parent for more than half the year during 2023? If yes, please list each adult relative who lived in the same home as the child for more than half the year, their relationship to the child. **TIE-BREAKER RULES MAY APPLY**

Yes No

Did the child live in a household with parents who are not married?

Are you claiming a child who is not your own son or daughter? If yes, please explain why the parents of the child are not claiming the child.

Yes No *Proof of residence may be required* Please make note of step-children.

Have you ever had Earned Income Credit, Child Tax Credit, Additional Child Tax Credit, or American Opportunity Credit disallowed or reduced in a previous year? Have you filled out the required recertification form?

Yes No **EIC CANNOT BE CLAIMED UNLESS CHILD RELATIVE LIVED WITH TP MORE THAN HALF THE YEAR**

TAX PREPARER'S NOTES

The shared responsibility payment has been reduced to “\$0” (zero) for all taxpayers. Form 8965 is no longer used and no health insurance information will be shown on the tax return unless the taxpayer received Form 1095-A from the marketplace.

If any person listed on this return had healthcare coverage through the marketplace (Exchange) for even one month of 2023, please submit form 1095-A.

RECEIVING YOUR REFUND

If you are due a REFUND would you prefer Check mailed to my address Direct deposit to my bank

Bank Name _____ Checking

Routing # _____ Account # _____ Savings

DURING 2023, DID YOU OR YOUR SPOUSE...

Live or work in any other states? If yes, please explain: _____

Receive any of the following?

- Wages or salaries
- Unemployment compensation
- Social Security benefits
- Disability from Insurance/VA
- Gambling winnings
- Pension, annuity, IRA, or retirement income
- Interest on savings or stock dividends
- Cancellation of debt by a lender
- Self-employ, Farm income, 1099K, NEC, Misc
- Crypto Currency- Bitcoin or others
- Rental Income – Received from a relative? Yes No

• Do you have any other world-wide income you need to report? Or Foreign Trust?

• Do you have signature control of any foreign accounts with a balance of \$10,000 or more?

Make payments for any of the following?

- Real estate taxes
- Home mortgage
- Charitable donations
- Fed estimated taxes Per Quarter:
- Student loan interest
- College tuition
- Energy Efficient Improvements (docs)
- State estimated taxes Per Quarter:

RENTERS: Rent you paid per month _____
 Number of months in 2023 _____
 Landlord Name & Address _____

Other

Do you/your spouse have a Health Savings Account? (HSA) Family or individual plan? Were all withdrawals for Medical Expenses? _____

Please Provide a detailed explanation of 1099K, 1099NEC or 1099Misc funds. What did you do for these payments, was it a hobby, business, prize, bonus, for-profit?

BUSINESS USE OF AUTOMOBILE MILEAGE

When did you place your vehicle into service for business purposes? Year _____

Enter miles in appropriate spaces Business _____ Personal _____ Commute _____

Was your vehicle available for use during off duty hours? YES NO

Do you or your spouse have another vehicle available for personal use? YES NO Do you have written evidence to support your deduction? YES NO

We will prepare your Federal and State income tax returns using information that you provide.

We may ask for clarification of some items, but we will not audit or otherwise verify the information you give to us.

YOUR RESPONSIBILITIES

It is your responsibility to provide all the information required for the preparation of complete and accurate tax returns. You should retain all documents, cancelled checks, and other data that support your reported income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for your income tax returns, and therefore, you should review them carefully before you sign them.

OUR RESPONSIBILITIES

We are responsible for taking the information given to us by you and ensuring your tax returns are accurate to the best of our knowledge. We are responsible for preparing only the specific income tax forms for the specified tax years (1040 and corresponding state income tax form). We are also responsible for the timely electronic filing of your tax returns.

Any other requested services/forms will require a separate engagement.

During our engagement with you, we may provide you with an estimated refund date. We do not however have any influence over the IRS or State issuing your refunds. These taxing authorities do not guarantee a specific date that a tax refund will be issued.

Your tax returns may be selected for audit by a taxing authority. In the event of a tax examination, we can arrange to assist you with any correspondence or communication that is initiated by the IRS or State.

It is our policy to keep records related to this engagement for 3 years. However, we do not keep any of your original records, so you should retain these records in secure storage. Upon the expiration of the 3 year period, we are free to destroy our records.

In the event of a complaint related to the services we provide, we agree to discuss the complaint, and if necessary, to take action in a good faith effort to resolve the complaint.

All information I have given is true and correct to the best of my knowledge. I also agree to and accept the Terms of Engagement.

Your Signature

Spouse's Signature

Date