

WILLIAMS & ASSOCIATES A.C.

Information 2022

TO AVOID DELAYS ON YOUR RETURN-PLEASE MAKE SURE THE NAMES AND SOCIAL SECURITY NUMBERS ARE EXACTLY AS THEY APPEAR ON YOUR SOCIAL SECURITY CARDS. PLEASE HAVE YOUR IDENTIFICATION READY. WE WILL SCAN COPIES OF YOUR DRIVER'S LICENSE & SOCIAL SECURITY CARDS.

Taxpayer Information			Spouse Information		
Name:			Name:		
Last	First	MI	Last	First	MI
Preferred Name:			Preferred Name:		
Social Security #:			Social Security #:		
Occupation:			Occupation:		
Date of Birth:			Date of Birth:		
E-Mail Address:			E-Mail Address:		
Best Contact #			Best Contact #		
Cell Phone #:			Cell phone #:		
Address:					
City:		State:		Zip Code	
Date of Death:			Date of Death:		

Marital Status as of December 31, 2022

<input type="checkbox"/> Single	Check if your spouse passed away within the past 2 years. <input type="checkbox"/> Check if Disabled Year of Disability: _____
<input type="checkbox"/> Married Filing Jointly	
<input type="checkbox"/> Head of Household	
<input type="checkbox"/> Married Filing Separately	

Dependent Information								
First Name	Last Name	Social Security # <small>* MUST HAVE CARD PRESENT *</small>	Date of Birth MM/DD/YYYY	Relationship to You	# of months lived with you in 2022	Eligible for EIC Yes/No	Child Care Expense Yes/No	Qualified Education Expenses Yes/No

Additional Information

**** IMPORTANT** - Any changes since we did your taxes last year? (Example: new child, new home, retired?) **If yes**, please list / describe below:

If you are to receive a refund this year, how would you want to receive it?	<i>CHECK or DIRECT DEPOSIT</i>	Please circle one
If Direct Deposit, Has your bank information changed since last given to us?	YES or NO	

**** Be sure to let the tax preparer know to avoid refund delays**

Additional Information Continued

Check all that apply to you, your spouse and/or dependents.	
<input type="checkbox"/> Earn interest/dividends on a checking/savings or other account?	<input type="checkbox"/> Sell timber, land or other real estate?
<input type="checkbox"/> Receive unemployment compensation ?	<input type="checkbox"/> Required to repay a homebuyer credit?
<input type="checkbox"/> Receive Social Security Income?	<input type="checkbox"/> Itemize deductions last year?
<input type="checkbox"/> Contribute to an IRA or other retirement plan?	<input type="checkbox"/> Own a business?
<input type="checkbox"/> Receive funds from a retirement plan?	<input type="checkbox"/> Own a corporation, partnership, trust, etc?
<input type="checkbox"/> Assessed an early withdrawal penalty?	<input type="checkbox"/> Pay child care expenses?
<input type="checkbox"/> Sell Stock?	<input type="checkbox"/> Employed as a teacher?
<input type="checkbox"/> Receive or pay alimony?	<input type="checkbox"/> Have Health Insurance? Market place or Other
<input type="checkbox"/> Make mortgage payments?	<input type="checkbox"/> Have you received a 1095A or 1095B ?
<input type="checkbox"/> Own rental property?	<input type="checkbox"/> Attended school in 2022?
<input type="checkbox"/> Own a farm?	<input type="checkbox"/> Made student loan payments?
<input type="checkbox"/> Receive royalties? (Gas, etc)	<input type="checkbox"/> Paid tuition for you or a dependent?

Who referred you to us? We would like to thank them! _____