

Intake Form



Tax Year _____ Phone _____ SSN _____ - _____ - _____

Name _____
Address _____
City _____ State _____ Zip _____
Email address _____

Gregory's Use only

Last Year

Fed \$ _____ i
State \$ _____ i
State \$ _____ i
Bill \$ _____
MT EC \$ _____

Filing Status (check one)

Single..... _____ **Married Filing Separate**..... _____
Married..... _____ **Head of Household**..... _____

Please answer with a YES or NO on each line.

- Are you a returning client?..... _____
- How many children will you be claiming this year..... _____
- Are you custodial Parent for All children claiming?..... _____
- Can you claim anyone else?..... _____
- Are you being claimed by anyone else?..... _____
- How many W2 Forms for this year?..... _____
- How many 1099 forms?(Misc/Other)..... _____
- How many 1099R Forms?..... _____
- Did receive a 1099C? (Cancellation of Debt)..... _____
- Any Gambling Income—W2G..... _____
- Mortgage Interest?..... _____
- Are you a College Student?..... _____
- Did you pay any College Tuition..... _____
- Are you a Tribal Member? (need Certificate)..... _____
- Did you receive Unemployment?..... _____
- Social Security Income?..... _____
- Any Interest Income? Dividends?..... _____
- Do you have a Foreign account (s)?..... _____
- Have Daycare expenses?..... _____
- Personally contribute to a retirement?..... _____
- Withdraw from a retirement?..... _____
- Spend any Cryptocurrency? (Bitcoin)..... _____
- Do you have business/Rental Income?..... _____
- Health Insurance for all in household for all 2018..... _____
- is Health Care from Market Place? 1099A form _____
- Any other type income? IF so what? _____

The undersigned guarantees that all information provided to Gregory's Tax and Bookkeeping Service for the purpose of preparing income tax returns is true and accurate. This also constitutes a contract with Gregory's Tax and Bookkeeping Service for the purpose of preparing income tax returns and the undersigned agrees to be responsible for all charges incurred in that process.

Signature _____