NATIONAL INSURANCE & TAX SERVICE
Building Life Long Relationships

TAXPAYER QUESTIONNAIRE
PERSONAL INFORMATION

Tax Year:

PRIMARY TAXPAYER

First name: Last name: M.I.:

SSN: Birth date: Identity theft PIN:

Preferred phone: Cell phone carrier:

Occupation: Email:

ID/DL number: State: Issued: Expires:

☐ Claimed on another return ☐ Legally blind ☐ Disabled ☐ Text messages OK

SPOUSE (IF APPLICABLE)

First name: Last name: M.I.:

SSN: Birth date: Identity theft PIN:

Preferred phone: Cell phone carrier:

Occupation: Email:

ID/DL number: State: Issued: Expires:

☐ Claimed on another return ☐ Legally blind ☐ Disabled ☐ Text messages OK

FILING STATUS & CONTACT INFORMATION

☐ Single ☐ Married filing jointly ☐ Married filing separately

☐ Head of household ☐ Qualifying surviving spouse

Filing status will be confirmed during preparation.

Referred by (new clients):

ADDRESS

Street address: Apt.:

City: State: ZIP: County:

☐ Military address / combat-zone service (attach details)

BANK INFORMATION - DIRECT DEPOSIT

Bank name: ☐ Checking ☐ Savings

Routing number: Account number:

Will this refund go to an account outside the U.S.? ☐ Yes ☐ No

DIGITAL ASSETS

During the tax year, did you receive digital assets as a reward, award or payment for property or services; or sell, exchange or otherwise dispose of digital assets (or a financial interest in them)?

☐ Yes ☐ No

OVERTIME PAY

Did you or your spouse receive overtime pay during the tax year? ☐ Yes ☐ No

Qualified premium - Taxpayer: $ Spouse: $

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DEPENDENTS

First name	Last name	Birth date	SSN	Relationship	Months with you

Could anyone else claim a dependent listed above? ☐ Yes ☐ No

CHILD CARE PROVIDER

Name: SSN / EIN:

Address: Amount paid: $

CHARITABLE CONTRIBUTIONS

Monetary donations: $ Noncash donations: $

Volunteer miles: Attach donation receipts / records and mileage details.

NOTES

DOCUMENT CHECKLIST - ATTACH ALL THAT APPLY

- ☐ ID / SS cards (taxpayer, spouse, dependents)
- ☐ W-2 / W-2G
- ☐ 1099-NEC / MISC / K; business P&L
- ☐ 1099-R / SSA-1099; retirement records
- ☐ 1099-INT / DIV / B; investment records
- ☐ 1095-A (Marketplace insurance)
- ☐ 1098 (mortgage) / property tax records
- ☐ 1098-T (tuition) / 1098-E (student interest)
- ☐ 1099-G / C; K-1; estimated tax payments
- ☐ 1099-DA; overtime / employer records

DISCLOSURE, PAYMENT TERMS & CERTIFICATION

I/we agree to pay applicable tax preparation fees and, if an unpaid balance is referred for collection, additional collection agency fees of 35% of the balance referred, court costs and reasonable attorney fees. Simple interest of 1.5% per month applies to outstanding principal from the final service date or final statement date, whichever is later. I/we consent to autodialed or prerecorded collection calls to the phone numbers provided, including cell numbers, by the collection agency or law firm collecting a past-due account.
Refund amounts and timing are determined by taxing authorities and may be affected by adjustments, reviews or offsets. Any refund-transfer product is subject to separate bank terms. No specific refund amount or payment date is guaranteed. I/we certify that the information supplied is true, correct and complete to the best of my/our knowledge. I/we will provide requested records and notify National Insurance & Tax Service, Inc. of corrections. Eligibility is reviewed during preparation.

Taxpayer signature: Date:

Spouse signature: Date:

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