



Eagle Point Accounting & Tax Inc.

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Forsyth, Ga. 31029
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admin@eaglepointaccounting.com

Tax Year: _____

- *I verify all information provided for tax return preparation including, but not limited to, wages, business income, withholdings, and business expenses (if applicable) is accurate and substantiates all claims indicated on the return. I have receipts or support for all expenses claimed.*
- *I vow that I have read and agree with Form 8867 (if applicable) which substantiates that I qualify for claimed credits on my tax return which may include Earned Income Tax Credit, American Opportunity Tax Credit, and Child Tax Credit.*
- *Additionally, I understand any and all potential future tax notice issues are my responsibility. Eagle Point Accounting & Tax is under no obligation to resolve tax notices associated with my tax account.*
- *I understand I will be charged a reasonable fee for services provided.*

Print Name

Date

Signature

Eagle Point Accounting & Tax

Client Tax Interview

Today's Date: _____

Tax Year: _____

Primary Taxpayer Information

Name _____

Phone Number _____

Email _____

Social Security Number _____

Date Of Birth _____

Occupation _____

Spouse Information

Name _____

Phone Number _____

Email _____

Social Security Number _____

Date Of Birth _____

Occupation _____

Current Address:

Address: _____

City: _____ **State:** _____ **Zip Code:** _____

Direct Deposit Information

Routing # _____

Account # _____

Filing Status: Circle One

Single **Married Filing Joint** **Head of Household** **Married Filing Separate** **Widower**

Dependents

<u>Name</u>	<u>Date of birth</u>	<u>Social Sec. Number</u>	<u>Relationship</u>

Eagle Point Accounting & Tax

2023 Tax Interview

<i>Did you receive any of the following:</i>	<i>Yes</i>	<i>No</i>	<i>If yes, please provide:</i>
Wages, tips, or other employment compensation			<i>W2</i>
Business Income			<i>1099-NEC or K1</i>
Miscellaneous income or installment payments			<i>1099-MISC or 1099-NEC</i>
Pension, Retirement, or IRA distributions			<i>1099-R</i>
Unemployment Compensation			<i>1099-G</i>
Gambling Winnings			<i>W2-G</i>
Interest or dividend income			<i>1099-INT or 1099-DIV</i>
Social Security or Railroad Retirement income			<i>1099-SSA or 1099-RR</i>
Rental income			<i>Rental income & expenses</i>
Farm income			<i>Farm income & expenses</i>
1095-A (Not 1095-B or C)			<i>1095-A</i>
<i>Do any of the following apply to you for the reporting tax year:</i>			
Sold stocks or other securities			<i>1099B</i>
Contributed to a retirement plan NOT on W2			<i>How much? What kind of plan?</i>
Bought or sold any type of real estate			<i>Settlement statement(s)</i>
Had a home mortgage			<i>1098</i>
Own a camper with an existing loan			<i>Interest paid on loan</i>
Purchase large item (car, boat, aircraft)?			<i>Sales tax on purchase agreement</i>
Made energy improvements to your primary residence or Rental Property?			<i>Purchase/Loan agreement and energy ratings</i>
Made charitable donations			<i>Donations statements and/or amount of donation</i>
Had foreign bank accounts			<i>Largest Value of EACH account in calendar year 2023</i>
Incurred significant medical expenses			<i>Amount of Medical expenses</i>
Made payments to the State for <i>prior year</i> tax due			<i>Amount paid? What state?</i>

