

J. D. FINANCIAL

Client Profile

Taxpayers Name _____

Spouse _____

SS# _____

SS# _____

DOB _____

DOB _____

EMAIL _____

EMAIL _____

Phone _____

Phone _____

Cell _____

Cell _____

Address _____

Address(if different) _____

Occupation _____

Occupation _____

Can you (will you) be claimed as a dependent on another return? (Y /N) _____

DEPENDENTS

DEP.# 1

DEP.# 2

Name _____

Name _____

SS# _____

SS# _____

DOB _____

DOB _____

Does this dependent live w/you? Yes _____ No _____

Does this dependent live w/you? Yes _____ No _____

How many months? _____

How many months? _____

Are you claiming this dependent? Yes _____ No _____

Are you claiming this dependent? Yes _____ No _____

Student: Full time _____ Part time _____

Student: Full time _____ Part Time _____

DO YOU HAVE ANY OF THE FOLLOWING:

Own a Home

Yes _____ No _____

Own Rental Property

Yes _____ No _____

Investment Income

Yes _____ No _____

Foreign Income

Yes _____ No _____

Education Expenses:	YES	NO
You	_____	_____
Spouse	_____	_____
Dependents	_____	_____
Own a Business	_____	_____
Student Loan Interest	_____	_____
Educator Expenses	_____	_____
IRA Contributions	_____	_____
Military	_____	_____
Did you claim the First Time Home Buyer Credit in 2008	_____	_____
Did you itemize last year	_____	_____
If yes, did you receive a State Refund	_____	_____
Was your insurance acquired through the marketplace?	_____	_____
Did you receive the 3 rd Federal Stimulus in 2021	_____	_____
Do you have income from more than one State?	_____	_____

Volunteer Fire Fighter or Ambulance Technician:

Taxpayer:	Spouse:
Name of Company: _____	Name of Company: _____
Address of Company: _____	Address of Company: _____

Is last year's tax return available? Yes _____ No _____

How did you hear about J. D. Financial? _____

May we contact you by: Mail _____ Email _____ Phone _____ Cell _____ Text _____

In the event there is a refund would you like it direct deposited into a bank (Y / N) _____

Bank Name _____

Bank Routing Number _____ Bank Account Number _____

Thank you for taking the time to complete this form. It helps me get to know you and what your tax preparation needs might be so that we can prepare the most accurate return.

Jennifer, JD Financial