

CONFIDENTIAL

Tax Year 2023

CLIENT INTERVIEW FORM



J.A.M. FINANCIAL SERVICES
127 Window Drive, Wake Forest, NC 27587

All questions contained in this questionnaire are strictly confidential and will become part of your Confidential INCOME TAX record.

NAME: (Taxpayer) _____ **(Spouse)** _____

DOB: _____ **SSN:** _____ **DOB:** _____ **SSN:** _____

OCCUPATION: _____ **OCCUPATION:** _____

Address: _____ **City:** _____ **State:** _____

Phone: (T) _____ **(Sp)** _____ **Email:** _____

Filing Status: Single- YES **Married filing Jointly-** YES **HOH-** YES **Married filing Separate-** (you are a student)

Widowed YES (date of death) _____ Can someone else claim you as a dependent: Yes _____ No _____

VETERANS- (T)- _____ (Sp) _____

Did you participate in Virtual Currency during the tax year? Yes _____ No _____ **Or Bartering** Yes _____ No _____

Health Care

1. **HEALTH INSURANCE-** (T)- YES _____ NO _____ (Sp)- YES _____ NO _____ (D)- YES _____ NO _____

2. Did you have health insurance all year through employer? Yes _____ No _____ (Need 1095-B or 1095-C)

3. Did you get health insurance through a healthcare.gov company? Yes _____ No _____ **ACA-1095A** Medicare-

Income Sources-Please check all that apply

W-2's _____ 1099 -SSA: Social Security Income _____ RRB-1099 Railroad _____
1099R- Pension, Annuity, Roth IRA or Retirement Income _____ Interest 1099-Int or Dividends 1099-Div _____
1099G- Unemployment Compensation _____ 1099Misc _____ 1099-NEC _____

SELF -EMPLOYED: YES- _____ **NO:** _____ **VEHICLE DES:** _____ **TOTAL MILES:** _____ **BUSINESS MILES:** _____

EXPENSES: **SE HEALTH INSURANCE:** YES NO **Please complete Schedule C form on website**

K-1 Income _____ Rental Income _____ W2-G- Winning from gambling _____
W2G or 1098T- Scholarships or Grants for School _____ 1099C- Cancellation of Debt _____
Foreign Earned/Investment Income _____ Farm Income _____ Minister income with Housing _____
Jury Duty Pay _____ Received Alimony: Yes / No If so, How much (yr)? _____ Divorce Date _____

CryptoCurrency Income Statements (1099-B) from broker (like Robinhood) Yes _____ No _____

Pay Any....?

Did you make any Estimated Pmts to IRS? Yes _____ No _____ **Estimated pmts to State?** Yes _____ No _____

NC SALES TAX- Did you buy items online/phone/amazon- YES NO **Approximate AMOUNT SALES TAX** \$ _____

DO YOU HAVE ANY ITEMIZED DEDUCTION EXPENSES? YES _____ NO _____

REFUND: DD- YES NO **DD- BANK NAME:** _____

ROUTING #: _____ **ACCOUNT #:** _____

MAIL CHECK- YES NO **FEE COLLECT-** (\$30) YES NO

DID YOU SELL A HOME DURING THE YEAR? (HUD-1 CLOSING/SETTLEMENT STATEMENT) Did you get a 1099-S?

I certify that I would like my taxes prepared according to the information supplied. By signing and submitting this form, I give JAM Financial Services consent to complete and file my taxes. ½ Payment due at Drop Off Remainder at Pick Up.

TP/SP Signature: _____ **Date:** _____ **Reviewer:** _____

DEPENDENTS

(The following individuals live with me and I provide at least 51% of their care.)

Last Name (If different from yours) First Name, Middle Initial		DOB (Date of Birth) Social Security Number		Last Name (If different from yours) First Name, Middle Initial		DOB (Date of Birth) Social Security Number
Father		DOB: __/__/____ SSN: _____	Child M <input type="checkbox"/> F <input type="checkbox"/>			DOB: __/__/____ SSN: _____
Mother		DOB: __/__/____ SSN: _____	Child M <input type="checkbox"/> F <input type="checkbox"/>			DOB: __/__/____ SSN: _____
Child M <input type="checkbox"/> F <input type="checkbox"/>		DOB: __/__/____ SSN: _____	Child M <input type="checkbox"/> F <input type="checkbox"/>			DOB: __/__/____ SSN: _____
Dep Type _____ M <input type="checkbox"/> F <input type="checkbox"/>		DOB: __/__/____ SSN: _____	Dep Type _____ M <input type="checkbox"/> F <input type="checkbox"/>			DOB: __/__/____ SSN: _____

Have you ever been disallowed Dep. Credits? If so, complete form 8862

EARNED INCOME (EIC) QUESTIONS-Please answer all

- Did the Dependents listed above live with you during the 2023 Tax Year? Yes No
- How many months during the year did they live with you? _____ Months
- Are the Dependents above US Citizens? Yes No Are you a Citizen? Yes No
Do you have a form 8832 allowing you to claim this child? Yes No
- Are you a Resident Alien or Green Card Holder? Yes No
- Are you filing a form 2555 or 2555-EX? (Alien Status/Non US Citizen) Yes No
- Were you a Non Resident alien during the year? Yes No
- Are you a Qualifying Child of anyone else? Yes No
- Can anyone else claim any of the Dependents above? Yes No
- Under the Tie Breaker rule can you claim the Child above? (or can someone else) Yes No
- Was your home and your spouse's home in the United States at least 1/2 year? Yes No
- Did you provide at least half of the support for the dependent (s) above? Yes No
- Is your child currently enrolled in college, elementary or high school Yes No Type _____

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