

New / Repeat Customer

NEW LIFE TAX TEAM IN-TAKE FORM
APP - <https://taxestogo.com/App/Download/3287>

Individual / Business Return



<u>Name</u> (Use line Number 1)	<u>Social Sec #</u>	<u>Birthdate</u>	<u>Relationship</u>
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____

(Use back of form for additional dependents)

Current Address: _____

Moved in 2023? Need all addresses and dates for local returns

<u>Address</u>	<u>Dates</u>
1. _____	_____

Cell /LL Phone # _____ **School District** _____

Filing Status: Single Married filing Jointly Married filing Separate* Head of Household

*Provide spousal information on back of form when filing "Married filing Separate".

(Name, SS#, Birthdate and months that you resided together during the tax year 2023)

Claimed on another Return? Yes / No **Name of Parent / Guardian** _____

Student Loan Interest Amount _____ **Form-1098-T - College** _____ **Year of Study** _____

Need Property Tax/Rent Rebate done? Yes / No

Work Related Expense Totals: (License fees, Union Dues, Clothing, Tools) _____

Do you have Form 1095-A for Federal or Pennie health insurance Yes / No

Owe on Local? - Direct debit / mail in voucher with a check (Blair County only) (Circle One)

Banking: Same as last year? Yes / No **If "No" please provide the following or voided check:**

Bank Name _____ Routing# _____ Account# _____

ONE "IN-TAKE" FORM IS NEEDED FOR EACH FEDERAL TAX RETURN. Federal and State Returns will be eFiled. **Local taxes**, if applicable, will be completed and **customer will need to mail the completed form** to their local office. **Property and Rent Rebate forms** will be submitted on-line. **No need to mail it in.**

There is a **minimum \$30.00 Donation** requested for each Federal Return. Business/Rental returns will be **minimum of \$50**. Donations will be going to non-profit organizations in our community and around the world.

You are responsible for providing all the necessary tax documents for the New Life Tax Team. Any amendments needed to your tax return, due to incomplete information provided, will require an additional \$30.00 donation.

Submitted by: _____ **Date:** _____

Email address _____ (For Tax Team Use Only)

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