

New / Repeat Customer

NEW LIFE TAX TEAM IN-TAKE FORM

Individual / Business Return

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

(Use back of form for additional dependents)

Current Address:

Moved in 2022? Need all addresses and dates for local returns

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

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 2022)

Claimed on another Return? Yes / No **Name of Parent / Guardian** _____
Student Loan Interest Amount _____ **College** _____ **Year of Study** _____

Need Property Tax/Rent Rebate done? Yes / No

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

Completed Federal/State returns: Emailed / Printed (Circle One)

Did you have Form 1095-A for Health Insurance Coverage for 2022 Yes / No

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. 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)

Facebook: New Life Worship Center Tax Team **Scott Seifer 814.215.1933 sseifer@hotmail.com**