



New for 2023, everyone will have a Start Date. Your tax professional will begin preparing your taxes and update you on that day. You can reserve a Start Date online before submitting your documents, or we will automatically assign the next available date if you send in your documents without reserving.

Current clients can use the "Check if same as last year" box.

Taxpayer Information

Spouse Information *Check if same as last year*

Full Name		Full Name	
Occupation		Occupation	
Phone #		Phone #	
SSN & DOB		SSN & DOB	
Email (required)		Email (required)	
Is the Taxpayer... <small>(check all that apply)</small>	<input type="checkbox"/> Blind <input type="checkbox"/> Deceased (date _____) <input type="checkbox"/> Claimed by someone else	Is the Spouse... <small>(check all that apply)</small>	<input type="checkbox"/> Blind <input type="checkbox"/> Deceased (date _____) <input type="checkbox"/> Claimed by someone else

Full address *Check if same as last year*

What is your filing status? *Check if same as last year*

- Single
 Married
 Filing Separate
 Head of Household
 Widow(er)

Dependents *ProFiler already has the SSN and DOB of my dependents*

Full Name	Social Security #	Relationship	Date of Birth	Grade	Claim every year?	K-12 expenses (MN)

Refund

If you receive a refund, how would you prefer to receive it? Direct deposit is fastest (avg is 1-3 weeks vs 4-8 weeks).

- Mailed check
 Direct deposit

Please provide a voided check or provide your bank information below. If it's the same as the previous year, enter the last four digits.

- 1) Enter your bank **account** number (select one: *Checking* or *Savings*).
2) Enter your **routing** number.

- 1) _____
2) _____

Itemized Deductions

If you contributed to charity, please list the total dollar amount.	\$ _____
How much did you pay for license tabs on vehicles?	\$ _____
If you own a home, enter your property taxes. <i>(include up to two locations)</i>	\$ _____
Personal medical expenses? <i>(do not include insurance premiums)</i>	\$ _____
Did you have Educator expenses <i>(teacher)</i> of up to \$300? If so, enter the amount.	\$ _____

Miscellaneous

Did you buy, sell, or transfer any virtual currency (example: Bitcoin)?	<input type="radio"/> Yes <input type="radio"/> No
Did you contribute to an education fund such as a 529 plan?	<input type="radio"/> Yes <input type="radio"/> No
Did you make any estimated tax payments? If yes, provide <u>dates and amounts</u> for both Federal and State in the notes section on the next page.	<input type="radio"/> Yes <input type="radio"/> No
Did you receive a 1095-A form? (marketplace insurance)	<input type="radio"/> Yes <input type="radio"/> No
Did anyone in your family attend college? If yes, include 1098-T form (you might have to get a copy from your child).	<input type="radio"/> Yes <input type="radio"/> No
Any student loan interest that you paid? If yes, include a statement.	<input type="radio"/> Yes <input type="radio"/> No
Did you install any energy-efficient material in your house? (e.g. doors, insulation, windows)	<input type="radio"/> Yes <input type="radio"/> No
Were any of your children in daycare or did you pay anyone to watch them? If yes, please attach paperwork for the provider's name, address, and ID number (Fed ID or SSN).	<input type="radio"/> Yes <input type="radio"/> No
Did you live and work in more than one state? If so, explain.	<input type="radio"/> Yes <input type="radio"/> No
Did you contribute to an IRA or HSA (health savings account) outside of your W-2? Traditional-IRA amount Taxpayer: \$ _____ Spouse \$ _____	<input type="radio"/> HSA <input type="radio"/> ROTH-IRA <input type="radio"/> Traditional-IRA <input type="radio"/> Consult with me

Do you have a rental property, farm or business of any size? Rental Farm Biz No

Each business, rental property or farm requires a separate organizer for that entity. Go to the following link to view those organizers: <https://profilerconsulting.com/organizers/>

MN taxpayers only

Would you like us to file a property tax refund or rent refund for you? We charge a small amount, and process them after April 15th. We file this separate from your 1040 return. More information can be found here: profilertax.com/mn-prop-tax/	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not MN resident
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How would you like to receive a copy of your tax return? Mail \$10 Pickup \$5 Digital *(free)*

Additional notes

IMPORTANT NOTE: Submissions that arrive later than March 15th, may need to be extended unless you have a reservation.

If applicable, we need the following docs to process your return:

- **W-2s** (wages)
- **1099-MISC/NEC** (contractor income)
- **1099-INT** (interest income)
- **1099-DIV** (dividend income)
- **1099-B** (stock sales)
- **1099-R** (IRA, pensions)
- **1098-E** (student loan interest)
- **W-2G** (gambling winnings)
- **SSA-1099** (social security benefits)
- **1099-G** (unemployment comp)
- **K-1** (s-corp or partnership income)
- **1098** (mortgage interest statement)
- **1098-Q** (education distributions)
- **1098-T** (college tuition payments)
- **1095-A** (marketplace insurance)
- **1099-SA** (HSA distributions)

If applicable, we only need total amounts from the following:

- Donation slips (Goodwill, church receipts, etc.)
- DMV receipts
- Medical
- Property tax

We don't need the following:

- Annual/Quarterly/Monthly reports from your financial institution (often many pages)
- Property tax valuation notice or proposed levies
- 1095-B and 1095-C (but we do need 1095-A if you had marketplace insurance)
- Bank statements (unless requested)
- Receipts

To the best of your knowledge, are you including *all* necessary docs/info?* Yes No

If you selected 'No', when do you think you'll have the additional documents to us? _____