PROFILER
CONSULTING

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Updated for Tax Year 2024. 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… (check all that apply)	☐ Blind ☐ Deceased (date_____________) ☐ Claimed by someone else	Is the Spouse… (check all that apply)	☐ Blind ☐ Deceased (date_____________) ☐ Claimed by someone else

Full address ☐ *Check if same as last year*

What is your filing status? ☐ *Check if same as last year* ☐ My marital status changed

◯ Single ◯ Married ◯ Filing Separate ◯ Head of Household ◯ Qualifying Surviving Spouse

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. ***"Amount You Owe"*** *- It's recommended that YOU pay online, so you have a receipt.*	1) _______________ 2) _______________

Identity Protection PIN (IP PIN)

Have you been assigned an Identity Protection PIN (IP PIN) by the IRS to protect your tax filings from identity theft? (this is not required)	◯ Yes IP PIN: ___________ ◯ No

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. *(include up to two locations)*	$______________
Personal medical expenses? *(do not include insurance premiums)*	$______________
Did you have Educator expenses (*teacher*) of up to $300? If so, enter the amount.	$______________

Miscellaneous

Did you buy, sell, or transfer any digital assets (example: Bitcoin)?	◯ Yes ◯ No
Did you contribute to an education fund such as a 529 plan?	◯ Yes ◯ No
Did you make any estimated tax payments? If yes, provide dates and amounts for both Federal and State in the notes section on the next page.	◯ Yes ◯ No
Did you receive a 1095-A form? (marketplace insurance)	◯ Yes ◯ No
Did anyone in your family attend college? If yes, include 1098-T form (you might have to get a copy from your child).	◯ Yes ◯ No
Any student loan interest that you paid? If yes, include a statement.	◯ Yes ◯ No
Did you install any energy-efficient material in your house? (e.g. doors, insulation, windows)	◯ Yes ◯ 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).	◯ Yes ◯ No
Did you live and work in more than one state? If so, explain.	◯ Yes ◯ No
Did you contribute to an IRA or HSA (health savings account) **outside** of your W-2? Traditional-IRA amount Taxpayer: $________ Spouse $________	◯ HSA ◯ ROTH-IRA ◯ Traditional-IRA ◯ 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 assist you with filing a property tax or rent refund? We charge a small fee for this service. For homeowners, we file property tax refunds after April 15th, while for renters, these refunds are filed along with their Minnesota Revenue tax return.	◯ Yes ◯ No ◯ Not MN resident

How would you like to receive a copy of your tax return? ◯ Mail $10 ◯ Pickup $5 ◯ Digital *(free)*

Additional notes

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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-C** (debt cancelation)
- **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)
- ***CRP*** (certificate of rent paid - MN renters)

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? ____________________