



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)	<input type="checkbox"/> Blind <input type="checkbox"/> Deceased (date _____) <input type="checkbox"/> Claimed by someone else	Is the Spouse... (check all that apply)	<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* 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.

1) _____

2) _____

“Amount You Owe” - *It's recommended that YOU pay online, so you have a receipt.*

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/>

Owners and Renters

Would you like assistance with filing a property tax or rent refund? We offer this service for a small fee. For most homeowners, property tax refunds are often filed after April 15th, while renters' refunds are typically filed alongside their state tax return. Please note that only certain states qualify for these refunds.

Yes
 No
 Not MN resident
State: _____

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-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? _____