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St. Michael, MN
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PROFILER CONSULTING

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. Providing complete information upfront allows us to prepare your tax return faster and with greater accuracy.

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 the same as last year*

◯ 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 the fastest (the average 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) ______________

Itemized Deductions

If you contributed to charitable causes, please list the total dollar amount.	$______________
How much did you pay for vehicle license tabs?	$______________
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 <u>dates and amounts</u> 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 the 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 materials 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/

Additional

Did you receive payments through PayPal, Venmo, Cash App, eBay, Etsy, or similar platforms? (This includes sales, reimbursements, side jobs, or any payout that may generate a Form 1099-K.)	◯ Yes ◯ No ◯ Not sure

Would you like us to file a ***property tax refund*** or ***rent refund*** for you? We charge a separate fee, and process them after April 15th. We file this separately from your 1040 return. More information can be found here: profilertax.com/mn-prop-tax/	◯ Yes ◯ No ◯ Not an MN resident

If applicable, <u>we need</u> the following documents 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 <u>only need total amounts from</u> the following:

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

We <u>don't</u> 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 for us? ______________________

How would you like to receive a copy of your tax return? ◯ Mail ◯ Pickup ◯ Digital