

**Sam Phillips, CPA**  
**1040 Client Fact Sheet**  
**Income Tax Year 2023**

Today's Date \_\_\_\_/\_\_\_\_/2024

Taxpayer's Name \_\_\_\_\_ DOB \_\_\_\_/\_\_\_\_/\_\_\_\_ Soc Sec # \_\_\_\_ - \_\_\_\_ - \_\_\_\_

Spouse's Name \_\_\_\_\_ DOB \_\_\_\_/\_\_\_\_/\_\_\_\_ Soc Sec # \_\_\_\_ - \_\_\_\_ - \_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ County \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

How do you want us to contact you?    Call    Text    Email    No Preference

What format would you like when your return is complete?

- I prefer to pick up a paper copy of my return       I prefer to download a digital copy

**Filing Status**    Married Filing Jointly       Married Filing Separately  
 Single       Head of Household (see addt'l form)  
 Surviving Spouse       Dependent on someone else's return  
(Date of spouse's death: \_\_\_\_/\_\_\_\_/\_\_\_\_)

**Please complete Dependent Questionnaire Form to CLAIM DEPENDENTS!**

**Please check all of the following that applies to you in 2023:**

- Had a business or were self-employed in 2023
- Paid property taxes (How many parcels? \_\_\_\_ County? \_\_\_\_\_)
- Bought/sold/inherited property (include closing statement)
- Made state or federal estimated tax payments (IF yes, include copies or list dates & amounts below)
  - Federal: \_\_\_\_\_
  - IL: \_\_\_\_\_
- Had a bank account outside of the United States
- Installed geothermal, solar units, or any other qualified energy efficient home improvements
- Had transactions involving cyber currency (e.g. Bitcoin, etc.)
- Gave away property or cash greater than \$17,000 to 1 person
- Purchased health insurance through the marketplace (copy of 1095A must be provided)
- Paid or Received alimony
- Paid childcare
- Paid a household employee (babysitter/caregiver/housekeeper) over \$2,600
- Paid private school tuition for a dependent in grades K-12
- Had college expenses for yourself or a dependent
- Paid interest on a student loan
- Interested in contributing to an IRA if that would save you taxes
- Interested in a Corp/LLC registered with Secretary of State



**Preferred Tax REFUND Option, if applicable (check one)**

- Paper Check
- Series I Savings Bonds
- Direct Deposit (Please provide bank information)

**Preferred Tax PAYMENT Option, if applicable (check one)**

- Paper Check
- Direct Debit (Please provide bank information)

Bank Name \_\_\_\_\_  Checking  Savings

Routing # \_\_\_\_\_


Account # \_\_\_\_\_

**Are you waiting on any additional tax forms? If so, please describe:**

**Is there anything else you would like us to know about before completing your tax returns? Please tell us:**

**PLEASE SIGN BELOW**

To the best of my knowledge the enclosed information is correct and includes all income, deductions, and other information necessary for the preparation of this year's income tax returns for which I have adequate records.

Signature  \_\_\_\_\_

Date \_\_\_\_ / \_\_\_\_ / 2024

*Thank you for choosing Sam Phillips, CPA!*