

Interview Worksheet

Please complete this form, save as, and either upload to SmartVault or email to Karen@karenquick.com
For Office Use: DO DO/BOX MAIL EMAIL

Date

Name (First/Last)

New Client Info

SSN

Date of Birth

Address

Cell

Email

Spouse Name

(if new in 2021)

Date of Birth

SSN

Dependents (New Clients + 2021 Births ONLY)

Name

Date of Birth

SSN

Name

Date of Birth

SSN

Name

Date of Birth

SSN

Please answer the questions below to help you determine which documents you will need to provide.

If you are divorced, single, separated, and/or a grandparent who is claiming children, we will need verification for our records that the children lived with the taxpayer all year.

Please remember to include all sources of income: W2's, 1099's, Banks, Investments, Winnings, Rentals, IRA, etc...

Partnerships, Corporations, LLC's (please provide documentation): Did you receive a PPP?

Yes

Is yes, please provide documentation.

No

Did you move last year?

Yes

Is yes, when

No

Did you buy/sell/refinance a home?

Yes

If yes, include HUD Settlement Statement.

If you own a home, please include your

No

mortgage statement.

Turn over to complete Interview Worksheet >>>>>

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| | | |
|---|---|--|
| Did you purchase a car or remodel your home? | <input type="checkbox"/> Yes <input type="checkbox"/> No | If yes, need sales tax paid for auto and/or sales tax paid on supplies for remodel (WA resident only). |
| Are you self-employed? | <input type="checkbox"/> Yes <input type="checkbox"/> No | If yes, include income and expenses for each business. |
| Did you pay tuition? | <input type="checkbox"/> Yes <input type="checkbox"/> No | If yes, include 1098T from college or institution. |
| Did you pay alimony? | <input type="checkbox"/> Yes <input type="checkbox"/> No | If yes, what is the date of your divorce? <input type="text"/> |
| Did you buy or sell virtual currency (Bitcoin) | <input type="checkbox"/> Yes <input type="checkbox"/> No | Is yes, include 1099 from financial institution |
| Did you make any tax estimates last year? | <input type="checkbox"/> Yes <input type="checkbox"/> No | Is yes, when <input type="text"/> and for how much? <input type="text"/> |
| Did you change banks last year? | <input type="checkbox"/> Yes <input type="checkbox"/> No | Is yes, please provide new account and routing information with your tax preparation documents. |
| Did you receive your stimulus money in 2021? | <input type="checkbox"/> Yes <input type="checkbox"/> No | If yes, how much? <input type="text"/> |
| Did you get your child tax credit in advance? | <input type="checkbox"/> Yes <input type="checkbox"/> No | If yes, how much? <input type="text"/> please provide IRS form 6419 |
| Even if you do not itemize your deductions, did you give any CASH charitable donations? | <input type="checkbox"/> Yes <input type="checkbox"/> No | Is yes, how much? <input type="text"/> please provide receipts |