MAROCOLA
Elite Solutions Inc

Individual Tax Return Questionnaire for Tax Year 20____

Preferred method of contact (Circle One)	Call	Text Message	Email

How did you hear about us?	ValPak	Google	Referral

Taxpayer		Spouse	
First Name		First Name	
Last Name		Last Name	
Social Security Number		Social Security Number	
Date of Birth		Date of Birth	
Occupation		Occupation	
Driver's License/State Issued ID	MUST INCLUDE COPY OR PICTURE	Driver's License/State Issued ID	MUST INCLUDE COPY OR PICTURE
Cell Phone Number		Cell Phone Number	
Email Address		Email Address	

Tax Return Address

Tax Return Address		Mailing Address if different	
Do you rent your place of residency? (Circle One) Yes or No		If YES, how much rent did you pay for this tax year?	
Did you sell your primary residence in this tax year? (Circle One) Yes or No			If YES, provide the following info
New Tax Return Address			
Copy of the closing statement (HUD-1) from the sale	Copy of the closing statement (HUD-1) from time of purchase	Details of any capital improvements you made	Any other expenses incurred by you during sale
Did you purchase a new property? (Circle One) Yes or No		If YES, provide copy of closing statement (HUD-1) for purchase	
Did you change your state of residency during this tax year? (Circle One) Yes or No			If YES, provide the following info
Previous Address		Date of Move	

Dependents

Do you have any children or did you financially support a family member in this tax year?

First Name		First Name	
Last Name		Last Name	
Social Security Number		Social Security Number	
Date of Birth		Date of Birth	
Relationship		Relationship	
Had income over $4,200	Yes or No	Had income over $4,200	Yes or No
First Name		First Name	
Last Name		Last Name	
Social Security Number		Social Security Number	
Date of Birth		Date of Birth	
Relationship		Relationship	
Had income over $4,200	Yes or No	Had income over $4,200	Yes or No

Direct Deposit

Would you like Direct Deposit? (Circle One) Yes or No		Type of Account (Circle One)	Checking or Savings
Routing Number		Account Number	

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Income, Deductions & Credits

Fill out the amount that applies for each category
MUST enclose a copy of each tax form that pertains

Income Items

Tax Form	Description	Number of Forms for Taxpayer	Number of Forms for Spouse
W-2's	Salaries, Wages, Tips and Other Compensation		
1099-G	Unemployment Compensation		
1099-R	Pensions, Annuities or IRA Distributions		
	If you withdrew money from an IRA, what did you use the money for?		
1099-INT	Interest Income		
NA	Foreign Accounts	Complete the enclosed "Foreign Accounts Worksheet"	
1099-DIV	Dividend Income		
1009-B	Stocks, Mutual Funds, & Other Investments		
	Stock Options - Granted or Exercised - Submit detail of the options		
NA	Virtual Currency - Submit detail of the transactions		
SSA-1099	Social Security Income		
1099-MISC	Self Employed Income	Complete the enclosed "Self Employed Worksheet"	
K-1s	Partnerships, LLCs, S-Corporations, Estates & Trusts		
1099-MISC	Rental Income & Royalties	Complete the enclosed "Rental Income & Royalties Worksheet"	
1099-Q	529 Plan or Education Savings Account		
	If you received either education distributions, was the money used for College?	Circle One Yes or No	
1099-SA	Health Savings Account Withdrawals		
NA	Alimony Received		
	If you received alimony, please provide Payer's Name and Social Security Number with total amount received		
1099-A / 1099-C	Cancellation of Debt		
	If you had Cancellation of Debt, were you insolvent at the time of cancellation		
W-2G / 1099-G	Gambling & Lottery Winnings		
	If you had Gambling & Lottery Winnings, please include Losses		

Deductions & Credits

Tax Form	Description	Amount for Taxpayer	Amount for Spouse
NA	Alimony Paid		
	If you paid alimony, please provide Recipient's Name and Social Security Number with total amount paid		
NA	ROTH - IRA Contributions		
NA	TRADITIONAL - IRA Contributions		
1098-E	Student Loan Interest Paid		
NA	Sales Tax on the purchase of Vehicle, Boat or Plane		
1098	Mortgage Interest Statement		
NA	Real Estate Taxes NOT included on 1098		
NA	Solar Tax Credit		
	If you installed or paid for solar panels, please provide installation date and amount of expenses for this tax year		
NA	Cash / Check / Credit Card Donations	Complete the enclosed "Donations Worksheet"	
NA	Clothing & Other NON CASH Donations	Complete the enclosed "Donations Worksheet"	
NA	Charitable Miles Incurred	Complete the enclosed "Donations Worksheet"	

Deductions & Credits Cont.

Fill out the amount that applies for each category
MUST enclose a copy of each tax form that pertains

Deductions & Credits Continued

Tax Form	Description	Amount for Taxpayer	Amount for Spouse
NA	Health Savings Account Contributions		
NA	Long Term Care		
NA	Health Insurance Premiums		
NA	Co-Payments		
NA	Prescriptions		
NA	Dental		
NA	Eyecare		
NA	Other Medical Expenses		
NA	Medical Miles Incurred		
1095-A	Health Insurance Marketplace Statement	MUST INCLUDE A COPY	
1098-T	College Tuition Statement	MUST INCLUDE A COPY	(Circle One) Undergrad or Grad
NA	Books, Supplies & Equipment Expense for College		
NA	College Savings Plan Contributions		
NA	Child and Dependent Care Credit	Complete the enclosed "Child and Dependent Care Worksheet"	
NA	Estimated Income Tax Paid	Complete the enclosed "Estimated Income Tax Worksheet"	
NA	Tax Return Preparation Fee		
NA	Safe Deposit Box		
NA	Legal Fees		
NA	Job Search Expenses		
NA	Investment Interest - Margin Interest		
NA	Investment Publications, Expenses, & Fees		
NA	Did you settle any tax notices concerning your prior years' return?	Circle One	Yes or No

Additional Information

Return this Tax Questionnaire and Tax Forms no later than April 1st

If we receive this information later than April 1st, you may need to go on extension or be charged a $50 "Rush Fee"

I have submitted this information for the sole purpose of preparing my tax return(s).

This information is true, correct, & complete to the best of my knowledge.

Taxpayer	Printed Name	Signature	Date
Spouse	Printed Name	Signature	Date