Last Name: _____ Phone # _____

Adams Bookkeeping Services Imc

1136 W 37th St Lorain Oh 44052 Phone: 440-233-5843

Taux Value	00	00	Fax: 440-654-2640 Website: adamsbookkeepii	ng.net			
Tax Year Taxpayer Name	20. e:	23	Date of Birth	Soc Sec#	ID Information		
					#		
					Issue Date		
					Expration Date		
Spouse Name:			Date of Birth	Soc Sec#	ID Information		
					#		
					Issue Date		
					Expration Date		
Current Addres	ss:						
Did you move in 2023? [] Yes [] No date move			ved	Previous address:	dress:		
Dependents:		.,					
Name	Months in Hor	me Relationship	Date of Birth	Soc Sec#	ID Information/School		
		<u> </u>					
Did you get mar	ried/divorced this	past year?	[] Yes [] No	If yes, date	•		
Did you have or	adopt a child(ren) this year?	[] Yes [] No	If yes, need birth ce	rtificate & soc sec card.		
Did anyone rece	eive, sell, send, ex	change or acquire	e any financial interest ir	n vitual currency?	[] Yes [] No		
Did any depend	lent have any form	n of income?	[]Yes []No Did	anyone else support der	pendent:[]Yes []No		
Was anyone in college? [] Yes [] No			If yes, need 1098-T from school for each student				
			We need college pa	id expenses for books, s	supplies etc.		
Paperwork we v	will need.						
W2's	K1's	1099R's	Unemployment	Soc Sec	Income form		
1099- Div's	Any 1099	1099S	Gambling income/lo	ss Brokeraç	ge statements		
1099-Int's	1098T		Last year's tax return if new cleint				
*Any paper tha	at you receive tha	at has to do with	taxes should be given	to us.			
Did you receive	any of the following	ng:					

Tips	Partnerships & S coroporations	Scholarships & fellowships	Gambling
Jury Duty	Rental income	Tax refund- state & local	Nontaxable income
Alimony- need date of divorce	Eastate & trusts	Royalties	Stock sales
Self employment income & expenses	Social Security Benefits	Hobby income	
Vitual Funds? Recevied? Sold?	Another income from anywhere?		

- * If you have business or rental property please attach income/loss statement and supporting documents
- * If you borrow money and the debt has been canceled or forgiven, please include 1099-A and/or 1099-C
- * If you have business or rental property or assets, we need depreciation schedules from previous years.
- * Alimony is not deductable for divorces after 12/31/2018.

Last Name:		A	dams Bookkeeping	Services Imc				
		A	1136 W 37th St Lo					
Phone # Phone: 440-2				3-5843				
			Fax: 440-654-					
Deductions			Website: adamsbook	keeping.net				
Contributions to tra	aditional IRA?			Home m	ortgage interest (1	098)		
Taxpayer	Date	Amount		Home m	ortgage pd to indiv	viduals		
Spouse	Date	Amount		1				
Contributions to Re	oth IRA?			1				
Taxpayer	Date	Amount		Investm	Investment interest pd			
Spouse	Date	Amount		Interest pd on student loan (1098-E)				
Alimony paid? Nee	ed date of divorc	е						
Self employed hea	Ith insurance			1				
Keoh, SEP & Simp		ıs		1				
Medical insurace p				Donations to Church				
Form 1095A - Mai		rance			Other cash contributions			
MSA contributions		10/04			Charitable auto mileage			
HSA contributions + acct balance 12/31				Property	Property donated for which you reciepts			
Prescriptions				<u> </u>	(fair market valu	ne)		
Eyeglasses								
Doctors				Real Estate Taxes				
Dentists				Personal property taxes				
Hospitals				Sales Taxes				
Ambulances				City/County Taxes				
Hearing aids & bat				Other taxes				
Medical travel exp				4				
Other medical exp	enses			4				
Reimbursements								
Estimated taxes Po	I IRS	State	City					
Date Pd & amount	i ikə	State	City					
Date Pd & amount				-				
Date Pd & amount				-				
Date Pd & amount								
Date Pd & amount				_				
Child Care Expens	ses							
Providers Name		Address		ID# of Provider	Amount Paid	Which Child		
Bank Account for o					t number	¬		
Bank Name checking		savings Routing numb		oer		_		
						_		
						_		