



TAX RETURN INFORMATION FORM

Client Name: _____ Phone Number: _____ Email: _____

Please provide the following information for the filing year(s) _____:

Returning clients should only update information if necessary.

☐ Family status: ☐ married filing jointly ☐ married filing separately ☐ single ☐ head-of-household

☐ Occupation: Taxpayer: _____ Spouse: _____

Address you want to include on the return. (This would depend on where you want your check or any IRS correspondence to be sent to.)

☐ Names as they appear on the social security card, social security numbers (including date of issue of the card if it is after the year of filing), and birthdays of all family members.

Name	SSN	Date of Birth	Date of Card Issue

☐ Method of remitting payment/receiving refunds- direct deposit/withdrawal or by check/refund check. Provide U.S. bank account information if pertinent.

Routing Number: _____

Account Number: _____

- ☐ I confirm that no family members listed above are listed as dependents on someone else's return.
- ☐ I confirm that my dependents resided with me during the year and that I provided at least half of the support.
- ☐ Salaries/wages forms, such as W-2's, Form 106's, 1099's, business profit and loss/ דוח רווח והפסד and/or shumat mas, paystubs (tlushim), etc. For Israeli wages please also send year-end pension reports (דוח שנתי).
- ☐ Daycare/ babysitting expenses for children under three including name, tax ID, address, amount. (Only necessary if you are in a high tax bracket. Please ask if this information is necessary for your return.)

Child	Name/Company	SSN of provider (if relevant)	Address	Amount paid

- ☐ Investment income [stocks (1099-B), interest or dividends (1099-int or 1099-DIV), K-1's, etc.]
- ☐ Miscellaneous income (e.g., rental income and expenses including property date of purchase and purchase price, royalties, property sale, etc.)

- ☐ Foreign bank account information - only if there was a total of \$10,000(+) aggregate balance in your foreign accounts (including pension and hishtalmut) at any time during the year.

Year	Bank/Insurance Name	Account #	Annual Highest Balance	Joint/Single

- ☐ If you are the owner or have partial ownership in a foreign company, you are required to report the annual financial information with the IRS (such as balance sheet, income statements, etc.) Please include a copy of the Israeli business return.
- ☐ If applying or renewing r an ITIN (non-citizens), please send a copy of your valid foreign passport.
- ☐ My family and I received: ☐ the first stimulus ☐ the second stimulus. If part of the family received it, please write who did not receive them and which ones. First: _____

Second: _____

- ☐ I confirm that to the best of my knowledge all information is accurate and true.
- ☐ Payment for services will be made within one week of filing the return regardless if the refund was received. Additional fees may apply for assistance with stuck refunds or audits.

Signature: _____

Looking forward to working with you!

Faigy Marzel

Any advice given by telephone or in writing is done so assuming the recipient has full intentions of using our services. We strive to provide legal and accurate information that involves much research, time, and knowledge. If there were no initial intentions, and the recipient only wished to take advantage of the advice and use it elsewhere, we consider it to be a form of gezel and a fee is expected.