

SUNCOAST TAX SERVICE INC.
DRIVERS LICENSE REQUIRED
PLEASE FILL OUT THE FOLLOWING INFORMATION

____NEW CLIENT HOW DID YOU FIND US?
(Fill in completely) _____

____RETURN CLIENT
(Fill in name and changes only, complete second part)

Filing Status: Single _____ Married/Joint _____ Married/Separate _____ Head of Household _____
Lived with spouse during year Y/N

Can you be claimed on someone else's return? _____

NAME :Last _____ First: _____ SS # _____ DOB _____

SPOUSE: Last _____ First: _____ SS# _____ DOB _____

ADDRESS: _____ PHONE: _____

_____ Zip: _____ WORK/CELL PHONE: _____

Occupation: Self _____ Spouse: _____

DEPENDENTS: Yes _____ No _____ (If yes, please complete the Dependent worksheet!)
Please Answer the Following Questions

1. Do you want Direct Deposit of your **REFUND** or **BALANE DUE FROM CHECKING?** Yes _____ No _____
If yes: Bank Routing #: _____ Account #: _____ Chkng or Svngs _____
2. Did you have MARKETPLACE HEALTH INSURANCE? 1095A _____(required to file)
3. Do you want your tax preparation fee taken from your refund (**a bank product, \$50.00 charge**)? Yes _____ No _____
4. Did you contribute to an IRA for 2020? Yes _____ No _____ If yes, how much? \$ _____ Regular or Roth _____
5. Did your spouse contribute to an IRA for 2020? Yes _____ No _____ How much? \$ _____ Regular or Roth _____
6. Did you make Federal Estimated Tax Payments (quarterly payments)? Total amount? _____
Did you make State Estimated Tax Payments? State _____ Total amount? _____
Do you want your refund to be applied to next year's tax payment? Yes _____ No _____ If yes, how much? _____
Do you need Estimated Tax Coupons for 2021? Yes _____ No _____
7. Are you a Florida resident? Yes _____ No _____ If new resident in 2020, when? _____
Do you have any out-of-state income (not including retirement)? Yes _____ No _____
8. Do you have monies in a foreign account? Yes _____ No _____
At any time during 2020, did you receive, sell, send, exchange, or otherwise acquire any financial interest in virtual Currency or bit coin? Yes _____ No _____
9. Where you a FIRST TIME HOMEOWNER in 2007-2008 and received \$7500.00 and you are currently paying back the loan? Yes _____
10. Are you a retired public safety officer? _____ Medical Insurance Premiums withheld from pension _____
11. **Did you receive in 2020 & 2021 Stimulus payment from IRS?** Yes _____ No _____ Amount _____
12. **Did you make a Charitable Contribution?** Amount _____ Receipt Required _____
13. **Did you receive Unemployment in 2020?** Yes _____ No _____

All information given to Suncoast Tax Service, Inc. for wages, interest, dividends, equity, and all other income, and all deductions are to my knowledge correct and I have written records to prove my deductions. Suncoast Tax Service, Inc. will prepare your return based on the information you have given us.

EMAIL:

Signed: _____ Date _____