**SUNCOAST TAX SERVICE INC.**

**2023**

**PLEASE FILL OUT THE FOLLOWING INFORMATION**

**DRIVERS LICENSE REQUIRED \_\_\_\_\_**

**\_\_\_\_**NEW CLIENT

HOW DID YOU FIND US? \_\_\_\_\_RETURN CLIENT

(Fill in completely) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (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: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**EMAIL ADDRESS**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Occupation: Self \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Spouse: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**DEPENDENTS: Yes \_\_\_\_ No \_\_\_\_ (If yes, please complete the Dependent worksheet!)**

**EDUCATION EXPENSES Yes \_\_\_\_ No \_\_\_\_ 1098 T & Expense Statement College**

**CHILD CARE EXPENSES Yes \_\_\_\_ No \_\_\_\_ Info**

**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. Did you contribute to an IRA for 2023? Yes \_\_\_\_\_No\_\_\_\_\_ If yes, how much? $\_\_\_\_\_\_\_ Regular or Roth \_\_\_\_\_\_\_\_\_

4. Did your spouse contribute to an IRA for 2023? Yes \_\_\_\_\_No\_\_\_\_\_ How much? $\_\_\_\_\_\_\_\_ Regular or Roth \_\_\_\_\_\_

5. 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 2024? Yes \_\_\_\_ No \_\_\_\_

6. Are you a Florida resident? Yes\_\_\_\_ No\_\_\_\_\_ If new resident in 2023, when? \_\_\_\_\_\_\_\_\_\_State: \_\_\_\_\_\_\_\_\_

Do you have any out-of-state income (not including retirement)? Yes\_\_\_\_ No\_\_\_\_

7. Do you have monies in a foreign account? Yes\_\_\_\_\_\_\_ No\_\_\_\_\_

At any time during 2023, did you receive, sell, send, exchange, or otherwise acquire any financial interest in virtual

Currency or bit coin? Yes\_\_\_\_\_\_ No\_\_\_\_\_\_\_\_\_\_

8. Where you a FIRST TIME HOMEOWNER in 2007-2008 and received $7500.00 and you are currently paying

back the loan? Yes \_\_\_\_\_\_\_

9. Are you a retired public safety officer? \_\_\_\_\_

Medical Insurance Premiums withheld from pension \_\_\_\_\_\_\_\_

10. **Did you receive Unemployment in 2023?**  Yes\_\_\_\_\_\_\_ No \_\_\_\_\_

11. New Customer submitted previous tax return. Yes \_\_\_\_\_\_\_ No \_\_\_\_\_\_

12. Do you have Identity Protection Number Yes\_\_\_\_\_ No\_\_\_\_\_\_\_\_ Copy of Letter\_\_\_\_\_\_\_\_\_

13. Energy Credit 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.**

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_