

R O O T E D PLANNING GROUP

Personal Information		
	Taxpayer	Spouse
Name		
Social Security Number		
Date of Birth		
Address:		
Driver's License Number: Provide copy of license, front & back		
Issue Date		
Expiration Date		
Dependents You are Claiming (please cross out any no longer claiming):		
Name	Social Security Number	Date of Birth
Credits		
Did you receive the Advanced Child Tax Credit Circle One	Yes	No
If yes, how much?		
If you have a refund would you like it directly deposited? Circle One	Yes	No
If you have a balance due would you like to pay by check or have the payment debited from your account? Circle One	Pay By Check	Direct Debit from Bank Account
Bank Routing Number		
Bank Account Number		

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Income Source		
	Form Type	Check Here When Provided
Wages:	W2	
Interest:	1099-INT	
Dividends:	1099-DIV	
Dividends:	1099-Consolidated	
Investments:	1099-B	
Social Security:	1099-SSA	
Retirement Account Distributions:	1099-R	
Unemployment	1099-G	
Miscellaneous Income	1099-Misc	
Non-Employee Compensation	1099-NEC	

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Alimony/Gambling/Jury Duty/Other	Upload Details	
Rental	See Rental Sheet (Schedule E)	
Business Name: Is this new?	See Business Sheet	
Deductions		
Student Loan Interest	1098	
College Expenses	1098-T	
Daycare Expenses	Provide Statement	
IRA, SIMPLE, or SEP contribution	Provide Details	
K-12 Educator Expenses	Provide Details	
HSA Contribution	Provide Details	
Medical Expenses	Provide Totals	
Real Estate Taxes	Provide Totals	

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Personal Property Taxes	Provide Totals	
Mortgage Interest	1098	
Charitable Deductions	Provide Details	
<ul style="list-style-type: none"> • If non-cash provide donation details 		
Additional Questions		
Additional Questions:	Provide Details If Yes CIRCLE ONE	
Did you pay or receive Alimony?	Yes / No	
Did you have a change in filing status?	Yes / No	
Did you have income from any source not listed?	Yes / No	
Did you sell any investments or property?	Yes / No	
Did you make estimated tax payments?	Yes / No	
<ul style="list-style-type: none"> • If yes, how much for Federal? 		
<ul style="list-style-type: none"> • If yes, how much for State? 		
Please include any additional tax documents not listed above (List):		
Is there anything else you would like us to know?		