Langley and Associates LLC

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New Individual Client Intake Form

First Name: ______ **MI:** ______ **Last Name:** ______

SSN/ITIN: ______ **Date of Birth:** ______

Cell Phone Number: ______ **Email:** ______

IPPIN (if applicable): ______

**The IRS issues new IPPIN's every year, they are not valid for multiple years.*

If married, do you plan to file jointly with your spouse? Yes ______ **No** ______ **Unsure** ______

If not filing jointly with your spouse, we still need your spouse's name and SSN/ITIN

Spouse First Name: ______ **MI:** ______ **Last Name:** ______

Spouse SSN/ITIN: ______ **Date of Birth:** ______

Cell Phone Number: ______ **Email:** ______

Spouse IPPIN (if applicable): ______

**The IRS issues new IPPIN's every year, they are not valid for multiple years.*

Current Address: ______ **Apt #** ______

City ______ **State** ______ **Zip Code** ______

Refunds & Tax Owed

If due a refund, do you want it direct deposited? Yes ______ **No** ______

If tax is owed, do you want it direct debited from your bank account? Yes ______ **No** ______

It depends on the amount ______

If you are opting for direct debit, what date would you like the payment to be made?

- **Same day as the return is filed** ______
- **This specific date:** ______
  - *If this date is after April 15th, a later date will delay filing of your return. Langley and Associates will not accept responsibility for any interest, penalties, fees, etc. incurred as a result.*

For Direct Deposit and/or Direct Debit, please provide bank account information and indicate account preferences.

Return Preparation Questions

Do you have dependents? Yes ☐ No ☐

Did you Buy/Sell/Exchange/Dispose of any cryptocurrency or NFT? Yes ☐ No ☐

Did you make any estimated tax payments during the tax year? Yes ☐ No ☐

If needed or recommended, would you like to make estimated tax payments for the current year? Yes ☐ No ☐

Do you have any business mileage associated with any of your income or activities (including W2 income when unreimbursed)? Yes ☐ No ☐

Do you have a home office, or use a portion of your home for business or rental income uses (including W2 income when unreimbursed)? Yes ☐ No ☐

Did you have any rental income activity? Yes ☐ No ☐

Did you start a new business or have an existing business? Yes ☐ No ☐

- **Business Name (if applicable):** ______________
- **Is this Self-Employment/a Schedule C business, or is this a business that has or requires it's own separate income tax return?**
  - **Self-Employment/Sch. C Business ☐**
  - **Has/Requires a separate tax return ☐**
  - **I do not know ☐**

Do any of the following expenses or contributions apply?

- **Student loan interest paid ☐**
- **Educator expenses paid ☐**
- **Health savings account contributions ☐**
- **Retirement Contributions ☐**

Other Questions

Do you have an IRS online account? Yes ☐ No ☐

Do you have a MAT (My Alabama Taxes) account? Yes ☐ No ☐

How did you hear about us? ______________________

Special Return Situations

Select all that apply

- I and/or my spouse are clergy/are a minister at a church/religious organization ____
- I and/or my spouse are an educator ____
- I and/or my spouse are a statutory employee (indicated on W2, is most common for insurance or outdoor sales employment) ____
- I and/or my spouse have non-US income or assets ____
- I am unable to obtain one or more tax forms from an employer or other entity ____
- A person on this return is deceased ____
- I need tax one or more returns prepared for prior years ____
- I will/may have multiple states on my return ____

If there is anything else that we should note about the return that is not covered by this and other forms you fill out, please provide a written note or email us about those things.

Client Signature: ______________________ **Date:** __________