

CLIENT INFORMATION FORM

Thank you for using Money Management Associates, LLC for your tax preparation and planning needs. To assist us in completing your tax return, please provide the following information and complete, sign and date the **Engagement Letter and E-File Authorization form**. If anything is missing, please leave what you have and get the missing information to us as soon as possible.

Your Name: _____

Best Number to Call: _____

Email Address: _____

- Copy of your Social Security Card and picture ID for each person claimed on your tax return if we do not already have these on file.
- Copy of income documents (W2's, 1099's, interest statements, unemployment documents, social security statements, etc.)
- Were you honorably discharged from the military? _____
- Did you and/or your spouse (if applicable) receive the first stimulus payment?
 - No ___ Yes ___ I do not remember ___ How much did you receive? _____ I do not remember _____
- Did you and/or your spouse (if applicable) receive the second stimulus payment?
 - No ___ Yes ___ I do not remember ___ How much did you receive? _____ I do not remember _____
- Amount paid for health/dental/vision insurance, co-payments, prescriptions: \$ _____
- Amount of Charitable Contributions made with check or cash: \$ _____
- If you rent, please provide the amount of your monthly rent \$ _____
- Your Mortgage and Property Tax information (if you are a homeowner or landlord)
- School/medical/daycare/social service/agency records confirming dependent lived with you for more than 6 months
- Form 1095A (from the Marketplace) or Insurance Card for each person claimed verifying they have medical insurance
- Form 1098T (if applicable) for anyone who is attending college at least half (1/2) time.

Disclaimer

I/We verify that all information provided is truthful and that I/We can provide additional supporting documentation if requested.

Signature _____ Date: _____

****NOTE: You must also sign the yellow Tax Refund Deposit and Payment Authorization form if you wish to have your preparation fee deducted from your refund (\$30 additional fee).**