

TODAY'S DATE

# EZ EXPRESS INCOME TAX ITEMIZER

TAX YEAR

FOR DEPENDENT CHILDREN UNDER AGE 18 OR IN COLLEGE

2023

NEW CLIENT  NEW ADDRESS

PARENTS NAME \_\_\_\_\_

TAX PAYER'S NAME: \_\_\_\_\_ SS # \_\_\_\_\_

TAX PAYER'S OCCUPATION: \_\_\_\_\_ BIRTH DATE: \_\_\_\_\_

STREET ADDRESS: \_\_\_\_\_ CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP CODE: \_\_\_\_\_

COUNTY \_\_\_\_\_ SCHOOL DISTRICT: \_\_\_\_\_

HOME PHONE NUMBER: \_\_\_\_\_ EMAIL ADDRESS: \_\_\_\_\_

## FORMS & THINGS TO BRING

- W-2: How Many? \_\_\_\_\_
- BANK FORM 1099-INT for Interest Income: How Many? \_\_\_\_\_
- DIVIDENDS FORM 1099-DIV How Many? \_\_\_\_\_
- NEW CLIENTS – Please Provide Last Year's Tax Return
- VIRTUAL CURRENCY BOUGHT/SOLD?
- IF YOU USED VENMO, PAYPAL OR ANYOTHER CASH APP PLEASE BRING FORM 1099K

## SALE OF STOCK OR OTHER PROPERTY

DESCRIPTION	DATE BOUGHT	DATE SOLD	SALE PRICE	COST PRICE

## OTHER INFORMATION

### OTHER INCOME

Jury Duty \_\_\_\_\_

Unemployment \_\_\_\_\_

Fed Unemploy WTH Tax \_\_\_\_\_

State Unemploy WTH Tax \_\_\_\_\_

Gambling/Bingo/Lottery Winnings \_\_\_\_\_

Did you attend college in 2023?  YES  NO

If YES, please provide FORM 1098-T. We will determine if it goes on your parents return or yours.

\*\*\*You can obtain a FORM 1098-T from your student online account. Tax Year 2023

Are you a VOLUNTEER FIREFIGHTER or AMBULANCE WORKER? YES  NO

Any Foreign Bank Accounts? YES  NO

Did you receive health care worker bonus? YES  NO

### How Do You Want to Receive Your Refund? Pay Balance Due?

Check  Direct Deposit/Debit ROUTING #: \_\_\_\_\_ ACCOUNT #: \_\_\_\_\_

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