



PLEASE FILL THIS OUT BEFORE YOUR APPOINTMENT

We must receive this to prepare your taxes!

New Client Intake Form

801.660.8200

hello@pack.tax

www.pack.tax

2325 N Washington Blvd
North Ogden, UT 84414

PERSONAL INFORMATION

Name		SSN	Date of birth
Taxpayer			
Spouse			
Street address, city, state, and ZIP			
Occupation	Phone	Email	
Taxpayer			
Spouse			

Marital Status at end of 2023
 Married Single
 Married filing separately Widow(er)*

*If spouse died in 2023 enter the date of death: / /

Have there been any significant changes in the information described in this section within the last year?

TAX PAYMENTS

Refund Direct Deposit

Bank Name	Routing #	Account #	<input type="checkbox"/> Checking	<input type="checkbox"/> Savings
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For any tax refunds, How do you want them back?
 Direct deposit to account above Mailed check

For any tax amounts you owe, how would you like to pay?
 Direct ACH from account above Mailed check

Did you make any estimated tax payments in 2023? (bring proof of payment)

Date	Amount	Date	Amount

DEPENDENTS

Dependent's first and last name	SSN	Relationship	Lived w/you for more than half the year? (Y/N)	Date of birth	Disabled (Y/N)	Full-time student (Y/N)

Y N
 Is it possible that any other adult (like your ex spouse) will be claiming any of these dependents?
If you are claiming any Earned Income Credit you must bring proof that the child lived with you for more than half the year. (School record, medical record, etc)

DAYCARE

Y N
 Did you pay any daycare expenses that were not reimbursed through work?

Name of Day Care Provider: _____ Federal ID Number (SSN or EIN) of Provider: _____
 Child Name: _____ Amount Paid: \$ _____

Name of Day Care Provider: _____ Federal ID Number (SSN or EIN) of Provider: _____
 Child Name: _____ Amount Paid: \$ _____

HEALTH INSURANCE

Y N
 Did anyone in your household have health insurance through the government marketplace? (If YES then you must bring your 1095-A statement available at healthcare.gov)
 Did you have a Health Savings account during the year?
 Did you use any funds from it? (This is found on your 1099-SA from the HSA.) Amount: \$ _____
 Did you ever use your Health Savings account to pay for things that were not qualified expenses?

Call us with questions at [801.660.8200](tel:801.660.8200) or email us at hello@pack.tax

CONTINUE ON REVERSE SIDE

ENERGY CREDITS

Y N

Did you make any energy improvements to your home in 2023?
 Solar Windows Exterior Door Furnace Hot Water Heater Insulation Other

Date of installation: _____ Purchase Price: _____ (bring proof of purchase and Energy Star Rating)

Did you purchase qualified Electric Vehicle in 2023? (Please bring documents from dealership)
 Make: _____ Model: _____ Year: _____ Purchase Date: _____
 VIN: _____

EDUCATION

Y N

Did you pay any student loan interest in 2023? How much? Taxpayer: \$ _____ Spouse: \$ _____

Did you pay any out of pocket expenses for tuition, books, or fees for school? (Must be post-high school.) How much? (If any tuition was paid, please bring the 1098-T tuition statement. You can get this directly from your online portal at the university or school.)

TOTAL PAID IN TUITION
 Taxpayer: \$ _____ Spouse: \$ _____ Dependent: \$ _____ Dependent: \$ _____

TOTAL PAID IN BOOKS AND SUPPLIES
 Taxpayer: \$ _____ Spouse: \$ _____ Dependent: \$ _____ Dependent: \$ _____

INCOME

Total number of W-2s from jobs Taxpayer: _____ Spouse: _____
 Total number of 1099-R retirement statements Taxpayer: _____ Spouse: _____

Y N

Did you receive income from Social Security? (Bring pink and white SSA statement.)
 Did you collect any unemployment? (Bring 1099-G from jobs.utah.gov)
 Did you sell any stock during the year? (Bring 1099-B.)
 Did you earn any interest or dividends this year? (Bring 1099-INT and 1099-DIV.)
 Did you have any self-employment income during the year? (Bring profit and loss.)
 Did you have any rental income during the year? (Bring profit and loss.)
 Did you have any other income that's not listed above? List here: _____

 Did you buy or sell any digital assets (like crypto, bitcoin, etc) during the year? (Bring 1099-B.)
 Did you receive more than \$600 through a third party processor like Venmo, Cash App, Paypal, etc? (Please bring 1099-k)

ADJUSTMENTS

Y N

Did you receive any alimony during the year? Amount: \$ _____ Date of Divorce: ____ / ____ / ____
 Did you pay any alimony during the year? Amount: \$ _____ Date of Divorce: ____ / ____ / ____
 Did you contribute to an IRA? Taxpayer: \$ _____ Spouse: \$ _____
 Did you contribute to a ROTH IRA? Taxpayer: \$ _____ Spouse: \$ _____
 FOR EDUCATORS: Did you have any expenses that were not reimbursed? Taxpayer: \$ _____ Spouse: \$ _____

ITEMIZED DEDUCTIONS

PLEASE COMPLETE WITH YOUR MONETARY AMOUNTS.

CHARITABLE DONATIONS:
 Monetary Donations: \$ _____ Material "Stuff" Donations (DI, etc; **garage sale value): \$ _____

PERSONAL HOUSES:
 Total Property Tax Paid on Personal Houses: \$ _____
 Total Mortgage Interest Paid on Personal Houses: \$ _____ (Please bring forms 1098-E)

MEDICAL EXPENSES:
 Total paid on medical and dental insurance premiums that are NOT paid through your employer: \$ _____
 Total out of pocket medical and dental expenses (incl. doctor bills, co-pays, etc.) Taxpayer: \$ _____ Spouse: \$ _____
 Total number of medical miles driven: Taxpayer: _____ Spouse: _____

Questions or Notes for Pack Tax: