



PLEASE FILL THIS OUT BEFORE YOUR APPOINTMENT

We must receive this to prepare your taxes!

Returning Client

801.660.8200

hello@pack.tax

www.pack.tax

2325 N Washington Blvd North Ogden, UT 84414

**PERSONAL INFORMATION**

Name

Taxpayer  Phone

Spouse  Email

Street address, city, state, and ZIP

Marital Status at end of 2023

Married

Married filing separately

Single

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?

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**TAX PAYMENTS**

Refund Direct Deposit

Bank Name  Routing #  Account #   Checking  Savings

For any tax refunds, How do you want them back?

Direct deposit to account above  Mailed check

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

Date	Amount	Date	Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

For any tax amounts you owe, how would you like to pay?

Direct ACH from account above  Mailed check

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**DEPENDENTS**

Who are you claiming this year?

Dependent's first and last name	Months in home	Full-time student (Y/N)
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

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**DAYCARE**

Y N

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

Child Name:  Amount Paid: \$

Child Name:  Amount Paid: \$

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**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 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.)

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 sell any Bitcoin or any other virtual currency during the year?

## 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 or ROTH IRA? Taxpayer: \$ \_\_\_\_\_ Spouse: \$ \_\_\_\_\_

- FOR EDUCATORS: Did you have any expenses that were not reimbursed? Taxpayer: \$ \_\_\_\_\_ Spouse: \$ \_\_\_\_\_

## DEDUCTIONS

## \*PLEASE COMPLETE WITH YOUR MONETARY AMOUNTS.

Tax laws have changed and even if you don't have enough to "itemize" you may still be able to use some of these on your 2023 taxes.

## CHARITABLE DONATIONS:

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

## PERSONAL HOUSES

# of loans on your house (includes HELOCS, 2<sup>nd</sup> mortgages, etc.): \_\_\_\_\_

# of personal properties you own (not rentals): \_\_\_\_\_

Total Property Tax Paid on Personal Houses: \$ \_\_\_\_\_

Total Mortgage Interest Paid on Personal Houses: \$ \_\_\_\_\_

Total Mortgage Insurance Premiums paid on Personal Houses: \$ \_\_\_\_\_

## 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:

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 AND BRING IT WITH YOUR DOCUMENTS  
 (We must receive this to prepare your taxes!)**