



**If dependent is not your child**

Do you know where the child's parents are?  yes  no  
 Did one the parents lived with you?  yes  no Did anyone else live with you?  yes  no  
 Can anyone else claim the child?  yes  no  
 Is there an active 8332 Release/Revocation form in place? yes  no

**Homeowner** Yes / NO **How many Properties**   
 # of Units 1 2 3 4 & Condominium (Complete Real Estate Property Form)

**Self Employed** Yes / NO  
 Business name \_\_\_\_\_  
 EIN: \_\_\_\_\_ - \_\_\_\_\_ Business address: \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ Ph: \_\_\_\_\_  
 E-mail: \_\_\_\_\_

Forms 1099 Misc & Contractor Letter	Records of gross receipts provided by taxpayer	Taxpayer summary of Income	Records of expenses provided by taxpayer	Taxpayer Summary of Expenses	Reconstruction of income and expenses	Bank Statements	Profit & Loss Statements
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- Bank Interest? Yes  No  2. Unemployment Comp? Yes  No
- Citizen  Resident Alien  4. IRA, Pension or annuity distribution? Yes  No
- Health Insurance - Yes  No  Private  Medicare/Medicaid   
**Insurance: Name:** \_\_\_\_\_ **FID#** \_\_\_\_\_  
**Member#** \_\_\_\_\_
  - Purchase through the exchange marketplace Yes  No
  - Purchase through employer Yes  No
  - Covered the whole year Yes  No  if not how many months \_\_\_\_\_
  - Do you have the insurance card with you? Yes  No
- Do you have form 1095-A Yes  No  7. Do you made contributions to a HSA Acct Yes  No
- Did you purchase or sell any Virtual currency last year? Yes  No  If you did attached for 8949
- Did you sell Stocks? Yes  No

Client's Signature \_\_\_\_\_ Date \_\_\_\_\_

Spouse's Signature \_\_\_\_\_ Date \_\_\_\_\_

**Payment Method**

Cash  Check  Credit Card  Bank Product  CashApp  Venmo  Paypal

**Bank Information**

**Name:** \_\_\_\_\_ **Routing #** \_\_\_\_\_ **Acct#** \_\_\_\_\_

**\*\*\*\*Filling fees are due at the time of service**

**Office use Only**

- Please attach a copy of picture I.D. Social Card, Insurance card and Original W-2 forms
- No typewritten SS Cards . All typewritten W- 2's must be verified
- When Claiming EIC dependents information must be verified
- All Self employed clients must submit accurate business income & expenses records at the time of filing
- Additional copies for previous tax return have additional fee of \$50.00 per tax year

By signing this form, I hereby certify that all information provided to Qualitech Professional Services is true ,correct to the best of my knowledge and belief ( I / we ) understand that any assessments, penalties or audits by the IRS due to omissions or erroneous information provided to Qualitech ( I / We ) waive the right to pursue legal action against Qualitech . ( I / We ) will seek proper Legal representation if necessary outside Qualitech Professional Services and agree to pay all document preparation at time of service.