

BENTON TAX & ACCOUNTING LLC

8900 Liberty Drive, Pleasant Valley, MO 64068

Office (816) 792-1616 Fax (816) 792-1640

www.bentontax.com reception@bentontax.com

Are you a new client? No Yes Who referred you? _____

Contact Information

	Name: First	MI	Last	Occupation	DOB	SS#
Taxpayer						
Spouse						
Address		City		State	Zip	County:
Taxpayer Cell Phone		Spouse Cell Phone		Work Phone	Home Phone	

Email _____

Did you live or work in KCMO? No Yes Please provide dates: _____

Personal Information

Marital Status at end of year		Taxpayer		Spouse		
<input type="radio"/>	Unmarried	Y	N	Y	N	Are you blind
<input type="radio"/>	Married Filing Jointly	Y	N	Y	N	Are you disabled
<input type="radio"/>	Married Filing Separately	Y	N	Y	N	Are you F/T student
<input type="radio"/>	Widowed	Y	N	Y	N	Do you want \$3 to go to the Presidential Election Campaign Fund?
Y	N	Were you Divorced or Legally Separated in 2020? Date _____				
Y	N	Did you live with your spouse during the tax year? Dates When: _____				
Y	N	Did you pay or receive alimony? _____				
Y	N	Is anyone in the home Disabled? _____				
Y	N	Can someone claim you as a Dependent? _____				
Y	N	Did you provide more than half the cost of maintaining a home? (Rent, Mortgage, Utilities & Food) _____				

Dependent Information

Student	Name: First	MI	Last	Months In Home	Relationship	DOB	SS#
Y	N	_____					
Y	N	_____					
Y	N	_____					
Y	N	_____					

Other Tax Information

Y N Are you current on filing tax returns? Last year you filed: _____

Y N Have you received a letter from any tax authority? Do you have unresolved tax issues? _____

Y N Did you make any Estimated tax payments? Federal \$ _____ MO \$ _____

Bank Information

For refund, would you prefer...

Direct Deposit Same as last year Mailed Applied to Next Year

Please sign verifying the information you have provided is **accurate and complete**

Signature _____

Date _____ Signature _____

BENTON TAX & ACCOUNTING LLC

Tax Organizer Checklist

*** We MUST have current photo ID to process your tax return***

Is your Bank Information Up-To-Date?

Please review to assure you have all your Forms needed to prepare your return

Your Name

Best Contact Phone # and Email

YES	NO	INCOME	YES	NO	OTHER INFO
		1st Stimulus Payment			Cash Contributions
		2nd Stimulus Payment			HSA - Distributions Form 1099-SA
		Unemployment			Student Loan Interest Form 1098-E
		Retirement Withdraw due to COVID			Teacher Expenses
		Marketplace Ins Form 1095-A			Daycare
		W2 Taxpayer			College Tuition Form 1098-T
		W2 Spouse			Participate in Coverdell or 529 Plan
		Interest/Dividends 1099-INT or DIV			Contribute to IRA/ROTH
		Brokerage Statement FINAL Stmt			Did you Itemize Last Year?
		Social Security Form SSA-1099			Medical Insurance Premiums
		IRA/Pension Form 1099-R			Medicare Supplement
		Early Withdrawal 401k			Medical Copays
		Sale of Assets &/or Residence			Rx
		Rental Property			Long Term Care Ins
		K1			Pay state tax last tax season
		Royalties			Pay KCMO e-tax
		Self-Employed			Do you own your home?
		1099-MISC			Mortgage Interest Form 1098
		Alimony			Real Estate Tax
		Farming			Vehicle Property Tax
		W2 Gambling			Charity
		Cancellation of Debt Form 1099-C			Non-Cash Charity
		Virtual Cryptocurrency			Gambling Loss
		Air BNB			
		Internet Business			
		Other: Hobby, Jury, Prize			

Questions or Comments To Your Preparer:

New Clients - Please Provide a Copy of Last Year's Tax Return

Date

Signature: X

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