Client Profile

Your Name	First	MI	Last
	Birth date	Your SSN	
Spouse Name	First	MI	Last
	Birth date	Spouse SSN	
Address	Street	Suite/Apt	
	City	State	Zip
Contact Info	Home	Cell	***Email:***
Employment Information	Taxpayer Employer	Work Phone	
	Spouse Employer	Work Phone	

Dependent Information

First Name	MI	Last Name	SSN	Birth Date	Relationship

Do you have any investments with our company Wood Financial Group? YES ______ NO ______

Do you or your spouse own an IRA or 401K? YES ______ NO ______
- ⇒ If yes, did you contribute to it? YES ______ NO ______
- ⇒ Contribution Amount: You: $__________________Spouse : $______________________

Do you or your spouse own any tax deferred annuities? YES ______ NO ______

Did you or your spouse take any distributions? YES ______ NO ______

Did you sell stocks, bonds or mutual funds this past year? YES ______ NO ______
- ⇒ If yes, please include a broker's statement

Did you re-finance your home this past year? YES ______ NO ______
- ⇒ If yes, did you pay any points? YES ______ NO ______
- ⇒ If yes, what was the amount: $ _______________

Did you have an early withdrawal or distribution from a pension plan or IRA? YES ______ NO ______
- ⇒ If yes, what was the amount: $ _______________

How much did you pay for tax preparation last year? Amount: $_______________

Amount of **first** EIP Stimulus Payment $_______________ Amount of **second** EIP Stimulus Payment $___________

Please return this form with all your information when you come for your initial tax preparation appointment.

Unless your previous tax returns were completed by Wood Financial Group, LLC, please bring the following:

1. Previous 2 years tax returns.
2. Names, Dates of Birth and Social Security Numbers of all dependents

Please remember to bring all of your W-2 forms, 1099 Interest (including accounts with Wood Financial Group), Dividend or Pension forms, and your Social Security Statements if you receive social security payments.

Did you live or work in another state this year? **Yes**__________ **No**__________

Do you have any rental property? **Yes**__________ **No**__________

⇒ ***If yes, please request a Schedule E-Rental Property Worksheet from our office***

Did you itemize deductions last year on Schedule A? **Yes**__________ **No**__________

⇒ ***If yes, please request a Schedule A-Itemized Deductions Worksheet from our office***

Do you own a business or are you self-employed? **Yes**__________ **No**__________

⇒ ***If yes, please request a Schedule C Worksheet from our office***

Did you receive any Schedule K-1 forms for shares in a Partnership, Limited Liability Company or Subchapter S Corporation? **Yes**__________ **No**__________

⇒ ***If yes, please bring copies of all of your Schedule K-1 forms.***

Did you sell or redeem any types of securities through another firm? **Yes**__________ **No**__________

*Schedule D-Capital Gains & Losses

⇒ ***If yes, please provide the record of each sale or redemption AND the amount you originally paid for the stock, bond or mutual fund instrument. Your broker should be able to provide you with a print-out of this information. Please try to obtain this information before your appointment as we will be unable to complete your tax return until we have it.***

Did you make estimated tax payments? **Yes**__________ **No**__________

⇒ ***If yes, complete the chart below:***

Record of Estimated Tax Payments			
Payment #	Payment Date	Check #	Amount Paid
1			
2			
3			
4			
TOTAL………………………………………………………………………………………			