CLIENT PROFILE

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

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.

If you are filing **jointly**, have your spouse use **C2 section** for the following questions.

Please Circle *YES* or *NO*

Did Wood Financial Group prepare your taxes last year? — **C1:** YES/ NO **C2:** YES/NO
- ➔ *If no, you **must** bring your last two years' tax returns*
- ➔ *If yes, no need to bring previous years' of tax returns*

Do you have investments with any firm outside of Wood Financial Group? — **C1:** YES/ NO **C2:** YES/NO

Did you live in another state, for more than 6 months, in 2022? — **C1:** YES/ NO **C2:** YES/NO
- ➔ If yes, State: ________

Did you work in another state this year? — **C1:** YES/ NO **C2:** YES/NO
- ➔ If yes, State: ________

Do you have any rental property? — **C1:** YES/ NO **C2:** YES/NO
- ➔ *If yes, request a Schedule E-Rental Property Worksheet from our office if you did not already receive one in this packet*

Did you itemize deductions last year on Schedule A? — **C1:** YES/ NO **C2:** YES/NO
If yes, request a Schedule A-Itemized Deductions Worksheet from our office if you did not already receive one in this packet

Do you own a business or are you self-employed? — **C1:** YES/ NO **C2:** YES/NO
If yes, request a Schedule C Worksheet from our office if you did not receive one in this packet

Did you receive any Schedule K-1 forms for shares in a Partnership, Limited Liability Company or Subchapter S Corporation? — **C1:** YES/ NO **C2:** YES/NO
- ➔ *If yes, please bring copies of all of your Schedule K-1 forms.*

Did you sell or redeem any type of securities in 2022? — **C1:** YES/ NO **C2:** YES/NO
*Schedule D-Capital Gains & Losses
- ➔ *If yes, please provide record of each sale/redemption AND amount you originally paid for the security. Your broker should be able to provide you with a print-out of this information. Please obtain this information before your appointment or we will be unable to complete your tax return.*
- ➔ *If yes, and you are a Wood Financial Client, know you must bring this information with you. Wood Financial Tax Preparation is a separate business and cannot freely share this information across.*

Did you make estimated tax payments? — **C1:** YES/ NO **C2:** YES/NO
- ➔ *If yes, complete the chart below:*

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

CLIENT PROFILE

<table>
<tr><td rowspan="2">Client Name and General Info</td><td colspan="2">C1: First Name:
C2: First Name:</td><td colspan="2">C1: MI:
C2: MI:</td><td colspan="2">C1: Last Name:
C2: Last Name:</td></tr>
<tr><td colspan="4">C1: Birth Date:
C2: Birth Date:</td><td colspan="2">C1: SSN:
C2: SSN:</td></tr>
<tr><td rowspan="2">Address</td><td colspan="4">Street</td><td colspan="2">Suite/Apt</td></tr>
<tr><td colspan="4">City</td><td>State</td><td>Zip</td></tr>
<tr><td>Contact Info</td><td>Home</td><td colspan="3">C1: Cell:
C2: Cell:</td><td colspan="2">C1: Email:
C2: Email:</td></tr>
<tr><td>Employment</td><td colspan="4">C1: Taxpayer Employer:
C2: Taxpayer Employer:</td><td colspan="2">C1: Work Phone:
C2: Work Phone:</td></tr>
<tr><td colspan="7">Dependent Information (Only input if your child falls under the IRS's definition of "qualifying dependent")</td></tr>
<tr><td>First Name</td><td>MI</td><td colspan="2">Last Name</td><td>SSN</td><td>Birth Date</td><td>Relationship</td></tr>
<tr><td></td><td></td><td colspan="2"></td><td></td><td></td><td></td></tr>
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</table>

Please Circle *YES* or *NO*

Do you have investments with Wood Financial Group? — **C1:** YES/ NO **C2:** YES/NO

Do you own any tax deferred annuities? — **C1:** YES/ NO **C2:** YES/NO

Did you take any distributions? — **C1:** YES/ NO **C2:** YES/NO

Did you receive, sell, exchange, or dispose of any financial interest in any virtual (crypto) currency? — **C1:** YES/ NO **C2:** YES/NO

Do you own a Traditional IRA or 401K? — **C1:** YES/ NO **C2:** YES/NO
- ➔ C1: If yes, did you contribute to it? Yes (amount):___________ No: ____
- ➔ C2: If yes, did you contribute to it? Yes (amount):___________ No: ____

Did you contribute to your spouse's IRA this year? — **C1:** YES/ NO **C2:** YES/NO
- ➔ C1: If yes, what amount: _____________
- ➔ C2: If yes, what amount: _____________

Did you take a withdrawal or distribution before age 59 ½ from a pension plan or IRA? — **C1:** YES/ NO **C2:** YES/NO
- ➔ C1: If yes, what was the amount: $ ________________
- ➔ C2: If yes, what was the amount: $ ________________

Did you have any qualifying charitable donations (QCD), meaning you donated money directly from your Traditional IRA? — **C1:** YES/ NO **C2:** YES/NO
- ➔ If yes, fill in below:

Charity: __________________ Amount: _____________
Charity: __________________ Amount: _____________
Charity: __________________ Amount: _____________

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