CLIENT PROFILE

<table>
<tr><td rowspan="2">Client Name and General Info</td><td>C1: First Name:
C2: First Name:</td><td>C1: MI:
C2: MI:</td><td colspan="4">C1: Last Name:
C2: Last Name:</td></tr>
<tr><td colspan="3">C1: Birth Date:
C2: Birth Date:</td><td colspan="3">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>Current Employment</td><td colspan="4">C1: Taxpayer Employer:
C2: Taxpayer Employer:</td><td colspan="2">C1: Work Phone:
C2: Work Phone:</td></tr>
</table>

Dependent Information (Only input if your child falls under the IRS's definition of "qualifying dependent")

First Name	MI	Last Name	SSN	Birth Date	Relationship

<u>Please Circle *YES* or *NO*</u>

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.

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

C1: If yes, did you make any withdraws? Yes (amount): ________ No: ___
C2: If yes, did you make any withdraws? Yes (amount): ________ No: ___

Do you own a <u>Traditional</u> *(not Roth)* 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? *(Only answer if you're 61 and under)* — **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 <u>directly</u> from your Traditional IRA? — **C1:** YES/ NO **C2:** YES/NO

- ➔ If yes, fill in below:

Charity: ________________ Charity: _________________
Amount: ___________ Amount: __________

CLIENT PROFILE

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

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.

<u>Please Circle *YES* or *NO*</u>

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

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

Did you live in another state, for more than 6 months, in 2023? — **C1:** YES/ NO **C2:** YES/NO
- ➔ If yes, State: ________

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

Did you sell or redeem any securities in 2023 outside of a retirement Account? <u>*Schedule D-Capital Gains & Losses</u> — **C1:** YES/ NO **C2:** YES/NO
- ➔ *If yes, please provide a 1099-B (record of each sale/redemption & amount you originally paid for a security). Your broker should be able to provide a print-out of this information. We will not be able to complete your tax return w/o this information.*
- ➔ *If you are a Wood Financial Group Client, know you must bring your 1099-Bs.*

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

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*

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 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			

*****Please bring a <u>new</u> voided check to your Tax Drop-off Appointment* ****