

"RETURNING" CLIENT INFORMATION SHEET

Tax Year:

Date: \_\_\_\_\_

MARITAL STATUS: SINGLE MARRIED



DLM SERVICES Tax Preparation & Notary

CHECK ALL THAT APPLY:

- 1. You obtained a Marriage License? YES / NO Date of Marriage?
2. You and your spouse lived apart during tax year? YES / NO Did you live together at any time after June 30?
3. Someone else claimed you (or spouse) as a dependent. If yes, who is claiming you (name and relationship) and why:
4. You were a student, had tuition, or had education expenses. YES / NO | Name of College:
5. Spouse was a student, had tuition, or had education expenses. | Name of College:
6. You received Pandemic Unemployment Assistance (PUA) in the year you are filing.
7. You are holding a Business License as of December 31, 2024?

FOR SINGLE/MARRIED FILING SEPARATELY FILERS ONLY

You have no mortgage or your home is paid off. You pay more than 50% of the mortgage. You share rent. Sec 8 GHURA Other
You pay more than 50% of rent (utilities included) You pay more than 50% of the rent. You pay more than 50% for utilities in your home. You pay more than 50% for groceries in your home. Another person in the household has a higher income? If yes, Who?
OTHER LIVING ARRANGEMENTS:

COVID RELATED QUESTIONNAIRE (ONLY IF YOU ARE FILING TY 2020 &/OR 2021)

For TY 2021

I/We received Advance CTC. Total amount received: \$
I/We (dependents) received 3rd EIP. Total amount received: \$

For TY 2020

I/We (dependents) received 1st EIP. Total amount received: \$
I/We (dependents) received 2nd EIP. Total amount received: \$

Indicate HOW MANY DOCUMENTS YOU ARE SUBMITTING:

- Wage Statement (W-2) Tuition Statement (1098-T) Mortgage Interest Statement (1098)
Corrected W-2 (W-2C) Pre-K Receipts Paid Real Estate Taxes
Miscellaneous (1099-MISC/NEC) Daycare Statement/Receipts Charitable/Religious Contributions
PUA (1099-G) Deed Program Receipts Schedule K-1
Received Interest (1099-INT) Lottery or Gambling Winnings (W-2G) Business/Professional License
Received Dividends (1099-DIV) Sold Stocks or Bonds GRT
Form 1099-R Marriage License/Certificate Totaled Gambling Loss \$
Social Security Benefits (SSA-1099) Death Certificate Totaled Medical/Dental Expenses \$
Health Savings Account (1099-SA) Legal Guardianship/POA Other: