

Client Information Sheet

D.S. Tax & Accounting Services, LLC.

Tel: 240-715-7948

12410 Milestone Center Drive Suite 600

Alt. Tel: 215-391-5046

Germantown, MD 20876

Email: dadahs@dstaxandaccounting.com

Select all that applied to you last year.

Select your marital status	Single <input type="checkbox"/>	Married <input type="checkbox"/>	Separated <input type="checkbox"/>	Widow/er <input type="checkbox"/>	Head of household <input type="checkbox"/>
----------------------------	---------------------------------	----------------------------------	------------------------------------	-----------------------------------	--------------------------------------------

Did you have children or dependent last year?	Yes	no
-----------------------------------------------	-----	----

Income you receive.

Did you have a job last year? W-2	yes	No
Were you self-employed last year? This includes freelancing and gig work: 1099-NEC, 1099-Misc or 1099-K	Yes	No
Did you receive interest from a bank Account? Form 1098-INT	Yes	No
Did you receive any dividends? 1099-DIV	Yes	No
Did you sell any stocks or investments? Form 1099-B	Yes	No
Did you sell or trade cryptocurrency? Form 1099-B or supplemental statements	Yes	No
Did you receive unemployment benefits? Form 1099-G	Yes	No
Did you withdraw funds or receive income from retirement account? Form 1099-R	Yes	No
Did you receive social security benefits?	Yes	No
Did you receive rental property income? Form 1099-NEC, 1099-Misc or 1099-K or other records	Yes	No
Did you receive income from S-Corp, partnership, or trust? Schedule K-1	Yes	No
Did you sell a home? 1099-S or escrow statement	Yes	No
Did you have canceled debt? Form 1099-A or 1099-C	Yes	No
Did you receive Gambling winnings, awards, prizes? W-2 G	Yes	No
Did you receive alimony?	Yes	No

Tax Breaks you might benefit from

Did you pay any mortgage interest? Form 1098	Yes	No
Did you pay tuition or other higher education expenses? Form 1098-T	Yes	No
Did you pay student loan interest? Form 1098-E	Yes	No
Did you receive payment from a qualified Tuition program? Form 1099-Q	Yes	No
Did you use money from a Health savings account (HSA) or medical savings Account (MSA) form 1099-SA	Yes	No
Did you pay out of pocket medical expenses or insurance?	Yes	No
Were you enrolled in an affordable Care Act plan? Form 1095-A	Yes	No
Did you pay alimony?	Yes	No
Did you make contributions to charity or church?	Yes	No
Are you a teacher/an educator?	Yes	No