



Personal Tax Prep Info Form

Please complete this digital form, save it as a PDF, print it and bring it with you to your tax prep appointment. If you don't have access to a printer, email the PDF of the completed form to info@jrjtaxes.com.

Have you filed with JRJ before?

Yes

No

When was the last year you filed with JRJ?

If you have a preparer you prefer, please list their name below:

Primary Taxpayer Information:

Name:

First Name

Last Name

Social Security Number:

Date of Birth:



Month Day Year

Email:

example@example.com

Occupation:

Current Address:

Street Address

Street Address Line 2

City

State / Province

Postal / Zip Code

Did you live in Maryland all year?

Yes

No

Phone Number:

Please enter a valid phone number.

Is anyone claiming you as a dependent?

Yes

No

Amount of federal stimulus payment received in March 2021:

Spouse Information: (If applicable)

Name:

First Name Last Name

Social Security Number:

Date of Birth:



Month Day Year

Occupation:

Current Address:

Street Address

Street Address Line 2

City State / Province

Postal / Zip Code

Did they live in Maryland all year?

Yes

No

Email:

example@example.com

Phone Number:

Please enter a valid phone number.

Is anyone claiming you as a dependent?

Yes

No

Amount of federal stimulus payment received in March 2021:

Dependent Information:

Who are you claiming?

Dependent #1 Name:

First Name

Last Name

Social Security Number:

Date of Birth:



Month Day Year

Relationship to you?

Check all that apply:

Student

Disabled

Lived with you all year

Paid childcare for them

Dependent #2 Name:

First Name Last Name

Social Security Number:

Date of Birth:



Month Day Year

Relationship to you?

Check all that apply:

- Student
 - Disabled
 - Lived with you all year
 - Paid childcare for them
-

Dependent #3 Name:

First Name Last Name

Social Security Number:

Date of Birth:



Month Day Year

Relationship to you?

Check all that apply:

- Student
 - Disabled
 - Lived with you all year
 - Paid childcare for them
-

Dependent #4 Name:

First Name Last Name

Social Security Number:

Date of Birth:



Month Day Year

Relationship to you?

Check all that apply:

- Student
- Disabled
- Lived with you all year
- Paid childcare for them

Amount of Advance Child Tax Credit payment received in 2021:

Amount Received

July:

August:

September:

October:

November:

December:

Total for 2021:

Income Sources (Check all that apply):

- Employer W-2
- Unemployment 1099-G
- Social Security SSA-1099
- Retirement 1099-R
- Interest Income 1099-INT
- Dividend 1099-DIV
- Stock or Mutual Fund Sale 1099-B
- Gambling Winnings W-2G
- Investment K-1
- Rental Property *
- Self-Employment 1099-NEC*

2021 Household Information (Check all that apply):

- Changed Family Size
- Changed Martial Status
- Childcare Paid
- Tuition Paid 1098-T
- Student loans 1098-E
- Health Insurance 1095-A
- HSA Contribution

Itemized Deductions (Check all that apply):

- Changed Family Size
- Changed Martial Status
- Childcare Paid
- Tuition Paid 1098-T
- Student loans 1098-E
- Health Insurance 1095-A
- HSA Contribution

Miscellaneous (Check all that apply):

- Sold Home
- Paid/Received Alimony
- Gambling Winnings
- IRA Contribution
- Purchased Virtual Currency
- Foreign Bank Accounts
- Win/Loss Gambling Statement

Bank Account Information:

If you receive a refund, where do you want it direct deposited?

Fill information below:

Name of bank:

Routing Number:

Account Number:

If you owe taxes and you want it automatically withdrawn, fill out this information:

Fill information below:

Day to withdraw:

Name of bank:

Routing Number:

Account Number:

JRJ Office Use Only:

Date Received:



Month Day Year

Amount Paid:

Deposit: