

## Tax Clarity Intake Form

Marital Status:      Single      Divorced      Widow      Married

### PEOPLE

First name:      Last name:      Date of birth:

If married, Spouse's

First name:      Last name:      Date of birth:

**Filing Status**      Single      Head of Household      Married Filing Jointly

### Dependents

First name:      Date of birth:      Dependent until age:

### SETTINGS

Tax Year:      Inflation Rate%:      Apply Tax Cuts and Jobs Act of 2017      Exclude Medicare Premiums

### ORDINARY INCOME

Earned Income      1040: Line 1z

Ordinary Income      Combine the following: 1040 Line 2b + (1040 Line 3b - 1040 Line 3a) + Schedule 1 Line 1 + Schedule 1 Line 2a + Schedule 1 Line 7

IRA Distributions or Pensions      1040 Line 4b + 1040 Line 5b

Self Employment Income      Schedule SE Line 3. Note all self-employment income should also be entered as either Specified Service Business Income or Qualified Business Income.

Specified Service Business Income      Schedule 1 Line 3 + Schedule 1 Line 5. Note: Do not count income as both Specified Service Business Income and Qualified Business Income

Qualified Business Income      Schedule 1 Line 3 + Schedule 1 Line 5 + Schedule 1 Line 6. Note: Do not count income as both Specified Service Business Income and Qualified Business Income.

### CAPITAL GAINS

Long Term Capital Gains      Schedule D Line 15; if no Schedule D, 1040 Line 7

Short Term Capital Gains      Schedule D: Line 7

Qualified Dividends      1040: Line 3a

### OTHER INCOME

Social Security      1040: Line 6a

Tax-Free Interest      1040: Line 2a

### ABOVE THE LINE DEDUCTIONS

Above-the-Line Deductions      From Schedule 1 combine: Line 26 - (Line 15 + Line 16 + Line 20)

IRA/Plan Contributions      Schedule 1 Line 16 + Schedule 1 Line 20

### SCHEDULE A - Inputs only need to be filled out if client is itemizing otherwise the automatic default is standard deduction.

Medical and Dental Expenses      1 - Medical and dental expenses

Taxes You Paid      5a - State and local taxes

5b - Real estate taxes

5c - Personal property taxes

6 - Other taxes

Interest You Paid      8a - Home mortgage interest and points reported on Form 1098

8b - Home mortgage interest not reported on Form 1098

8c - Points not reported to you on Form 1098

9 - Investment interest

Gifts to Charity      11 - Gifts by cash or check

12 - Other than cash or check

13 - Carryover from prior year

Casualty and Theft Losses      15 - Casualty and theft losses (Other personal casualty and theft loss) (For qualified disaster - enter under other itemized deductions)

Other Itemized Deductions      16 - Other itemized deductions