



Client In-Take Form

All information is held strictest confidence. At no given point is information disclosed or shared without client's written consent.

Thank you for trusting BbFTax Services!

Enter the Name of your TAX Preparer *

Today's Date *



Month Day Year

Primary Full Name *

First Name Last Name

Will your spouse be filing with you? *

Yes

No

Not Married

Spouse's Full Name (if applicable)

Last Name

First Name

Are you a US Citizen? *

Yes

No

Primary Occupation/Job Title *

Primary's Social Security Number *

Primary's Cell Phone Number *

Primary's Cell Phone Provider (to text refund status) *

Primary's E-mail *

example@example.com

Primary's Address *

Street Address

Street Address Line 2

City

State / Province

Postal / Zip Code

Country

Do you know your filing status? *

Single

Head of Household (unmarried with dependent(s))

Married Filing Joint

Married Filing Separate

Lived separate from spouse for last 6 months of year

Divorced or Widowed this year

Not Sure

Spouse's Full Name

First Name

Last Name

Spouse's Occupation/Job Title

Spouse's Social Security Number

Spouse's Cell Phone Number

Spouse's Cell Phone Provider

Spouse's E-mail

example@example.com

Do you have dependents? *

Yes

No

Dependent 1 Full Name

First Name

Last Name

Dependent 1 Social Security Number

Dependent 1 Gender

Male

Female

Dependent 1 Relationship to You

Dependent 1 Live with You for 12 Months?

Yes

No

Dependent 2 Full Name

First Name

Last Name

Dependent 2 Social Security Number

Dependent 2 Gender

Male

Female

Option 3

Dependent 2 Relationship to You

Dependent 2 Live with You for 12 Months?

Dependent 3 Full Name

First Name

Last Name

Dependent 3 Social Security Number

Dependent 3 Gender

Male

Female

Option 3

Dependent 3 Relationship to You

Dependent 3 Live with You for 12 Months?

Yes

No

Dependent 4 Full Name

First Name

Last Name

Dependent 4 Social Security Number

Dependent 4 Gender

Male

Female

Option 3

Dependent 4 Relationship to You

Dependent 4 Live with You for 12 Months?

Yes

No

**If the IRS asks you, what documents can you provide them to prove dependents resided with you?
(Click All That Apply)**

- School Records
- Medical Records
- Landlord or property statement
- Child care provider records
- Placement agency statement
- Social service records/statement
- Other
- I don't have any records

Does this apply to you?: (select one option below)

If you have custody of your child, but want to release the right to claim the child's exemption to the non-custodial parent, this is perfectly legal. This is typically done if you don't file a return OR if you reach an agreement with your child's noncustodial parent.

Does this apply to you?

#1:: This DOES NOT apply to me since I have no dependents

#2: This DOES NOT apply to me because all my dependents lived with me for 12 months

#3: Even though 1 or more of my dependents did not live with me for the full 12 months, I DO NOT have a "Custodial Parent Release Claim" (Form 8336 or similar document). I need one. I would like advisement on this.

#4: This DOES apply to me and I DO have a "Custodial Parent Release Claim" (Form 8336 or similar document) because 1 or more of my dependents did not live with me for the full 12 months.

Were you a Full Time Student for at least 6 month? *

Yes

No

Can you be claimed as a Dependent on another person's return? *

Yes

No

Did someone else provide more than half of your support? *

Yes

No

Are you or have you EVER been banned from Claiming EIC, also called EIC Disallowed? *

Yes

No

Not Sure

I have been disallowed before, but not anymore

Do you have any of the deductions? (check all that apply) *

Mortgage Interest, and Investment Expenses

Gifts to Charity

Casualty Losses, Job Expenses, and Other Deductions

Medical and Dental Expenses

None of the Above

Which forms of Income do you have? (check all that apply) *

W-2

1099

Self-Employment

Unemployment Compensation

Social Security (You or dependents)

IRA or Pension Distribution as reported on a 1099-R

Interest and Dividends (reported on a 1099)

A State Refund Received Last Year

Gambling Winnings as reported on W-2G

Did you pay for child care? *

Yes

No

Not Applicable

Not Sure

Total expenses paid for Child Care:

Child Care Provider Name

Child Care Provider SSN or EIN

Child Care Provider Phone Number

Area Code

Phone Number

Child Care Provider Address

Street Address

Street Address Line 2

City

State / Province

Postal / Zip Code

Country

Do you have any of the following adjustments? (check any that apply)

Educators expenses (if you were a teacher)

Student Loan Interest Expense

IRA Contributions: More Info

Alimony Paid

Tuition and Fees Deduction (if you were in school)

Are you paying upfront for your tax prep fee or getting a bank product (so that your fee is deducted from your refund)? *

I will pay in check, cash or credit card at the time I get my taxes prepared

I will pay using a bank product and have my fees deducted from my refund.

Not sure. I will need my preparer to give me more info

How do you want your refund (if applicable) *

Direct Deposit

Check

Walmart Direct2Cash

Visa Pre-Paid Card

Bank Name *

Direct Deposit Info: Routing Number *

Direct Deposit Info: Checking Account Number *

CONFIRM Direct Deposit Info: Checking Account Number *

Your Tax Preparer's Name & Email is Required So They Will Receive a Copy of This Form. Call them after to confirm they received it and IF NOT, forward them the copy that will be emailed to you. *

First Name

Last Name

Tax Preparer's Email *

example@example.com

Is there any other info you want you tax preparer to know?

Additional Services

No, I am not interested at this time

Yes, I agree to deduct fees from my Tax Return

CASH ADVANCE Processing Fee
(\$79.00 Pre-Ack)Check Only
(\$25.00 Post-Ack) PP Card
One Time Payment
(Non-Refundable)*

Audit Protection

\$44.95 (one time payment)

LegalShield/ID Theft Protection (\$299.88/yr) or
\$34.90 (mo)
www.WhatIsIs.com

Life Insurance (various pricing)

Click below & sign to indicate that this form is your express permission for your tax preparer to prepare & submit your return. You will still need to sign your tax & bank docs to submit your return. Exit out you're not giving the preparer permission to do your taxes. *

Did Anyone of Health Care from the Market place *

No

Yes

Important Note: If you apply for anything over \$500 and you get approved. There is an additional 36% interest on your loan. (not recommended). Anything under \$500 the processing fee applies (see above).

Important Note about the FAST CASH: This is a loan against your refund. If you apply for anything over \$500 and you get approved. There is an additional 36% interest on your loan. (not recommended). Anything under \$500 the processing fee applies (see above).