



# Taxpayer Acknowledgement Form

Taxpayers Name: \_\_\_\_\_

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- 1) Did you file taxes last year?  Yes  No
  - 2) Do you have debt with any of the following?  IRS  Student Loans  Child Support
  - 3) Are you planning on purchasing a home within the next year?  Yes  No
  - 4) Did you and all members or your household have insurance for the entire year?  Yes  No
  - 5) If health insurance was through the marketplace, we CANNOT file your return without a 1095A form
  - 6) What is your preferred method of communication?  Call  Text  Email

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Do you have any of the following? *(Select all that apply)*

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|---|---|
| <input type="checkbox"/> Childcare Expenses                             | <input type="checkbox"/> Student Loan Interest/Tuition Fees     |
| <input type="checkbox"/> Contribution to Church/Charity Etc.            | <input type="checkbox"/> Own Rental Property                    |
| <input type="checkbox"/> Home Business or Self Employed (1099 misc)     | <input type="checkbox"/> Employee Business and Vehicle Expenses |
| <input type="checkbox"/> Home Mortgage Interest / Real Estate Taxes     | <input type="checkbox"/> Health Savings Account                 |
| <input type="checkbox"/> Contributions / Distributions from IRA or 401K | <input type="checkbox"/> Moving Expenses                        |

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**PAYMENT PREFERENCE**  **Deducted from your refund(additional charges apply)**  **Paid upon completion**

Refund Method  Direct Deposit  Check by Mail

Bank Name: \_\_\_\_\_ Account Type:  Checking  Savings  Other

Routing #: \_\_\_\_\_ Account #: \_\_\_\_\_

**Return Status:** Please allow 21 days for processing. Check the status of your return at [www.irs.gov/refunds](http://www.irs.gov/refunds) or call 800-829-1040

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Signature

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Date

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Spouses Signature

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Date

For more information, please contact us anytime at (727)276-2315 or visit us at [www.alexander.financial](http://www.alexander.financial)