

CIR Professional Services

Please provide the following information needed to prepare your tax return

What is your occupation (job title) at work? If more than one job chose the job you spend more time in. _____

What is your current address? _____

Did your marital status change before the end of last year? _____

Were there any changes in dependents? _____

If you are claiming dependents, did you received monthly payments during the last half of the year for the Advanced Child Tax Credit? _____

Did you have any child or dependency care expenses? Please include care provider's name, address, SSN/EIN, and amount. _____

Did you buy or sell stocks, mutual funds, bonds, crypto, or other investment properties? _____

Did you donate money, clothes, cars, or stock? _____

Did you incur any tuition or continuing education expenses? _____

If yes, please list any and all school related expense you incur throughout the year. _____

Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)? _____

Did you and your dependents have health care coverage for the full-year? _____

Did you receive any of the following IRS documents? Form 1095-A, 1095-B, or Form 1095-C? If so, please send. _____

Do you want to electronically file your tax return? _____

For direct deposit, please provide your bank name, routing number, and account number. _____

Please list any questions or other concerns you might have. _____