PJFTax

New Tax Client Quote Request

What is your Name?

How did you hear about us?

What tax year(s) do you need filed?

What is your tax filing status? Single ☐ Married Filing Jointly ☐ Married Filing Separately ☐ Head of Household ☐ Qualifying Widower ☐

Income

How is your income reported to your? **W2** ☐ **1099** ☐

How many W2s and/or 1099s do you receive?

What is your approximate total income?

Do you receive any K1's **YES** ☐ **NO** ☐

Do you have a small business (sole proprietor)? **YES** ☐ **NO** ☐

Dependents

How many dependents do you have?

Are you married? **YES** ☐ **NO** ☐

Do you pay dependent care expenses? **YES** ☐ **NO** ☐

Other Income and Investments

Account Type (401k, IRA, Brokerage, Joint, Roth, etc.)	Approx. Value	Receive Dividends/Interest?
		☐
		☐
		☐
		☐

Itemized Deductions

Do you own a house? YES ☐ NO ☐

Do you deduct qualified medical expenses? YES ☐ NO ☐

Do you have charitable contributions? YES ☐ NO ☐

Do you have unreimbursed business mileage? YES ☐ NO ☐

Other

What state tax returns do you need to file?