

GREGG KATZ / PERSONAL INCOME TAX RETURN INTAKE **FILLABLE FORM**
YOU CAN PRINT THIS OR FILL IT IN, SAVE IT AND THEN EMAIL IT TO ME.
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A. Tax Year (Check All That Apply If We Are Doing Multiple Years)

2020 2021 2022 2023 2024 2025

B. Filing Status (Check One)

Single Married Filing Jointly

Married Filing Separately

Spouse's Name: _____

Head of Household

Qualifying Person: _____

Qualifying Surviving Spouse

C. Taxpayer Personal Information

Full Legal Name: First _____ MI _____ Last _____

Social Security Number: _____ - _____ - _____

Date of Birth: _____ / _____ / _____

Occupation: _____

Phone Number: _____

Email Address: _____

D. Spouse Information (If Applicable)

Full Legal Name: First _____ MI _____ Last _____

Social Security Number: _____ - _____ - _____

Date of Birth: _____ / _____ / _____

Occupation: _____

E. Address & Contact Information

Street Address: _____

Apt/Unit: _____

City: _____ State: _____ ZIP: _____

Dependent 1

Full Legal Name: First _____ MI _____ Last _____

Social Security Number: _____ - _____ - _____

Date of Birth: _____ / _____ / _____

Relationship: _____

Lived With You All Year? Yes No If no: Months _____

Qualifies for: Child Tax Credit Credit for Other Dependents

Dependent 2

Full Legal Name: First _____ MI _____ Last _____

Social Security Number: _____ - _____ - _____

Date of Birth: _____ / _____ / _____

Relationship: _____

Lived With You All Year? Yes No If no: Months _____

Qualifies for: Child Tax Credit Credit for Other Dependents

(Add more if needed)

G. Standard Deduction Questions (Required by IRS)

For Taxpayer:

- Someone can claim you as a dependent
- Born before 1/2/1961
- Blind

For Spouse:

- Someone can claim your spouse as a dependent
- Born before 1/2/1961
- Blind

H. Income & Document Checklist (Provide All That Apply)

Check all income forms the taxpayer received. Leave unchecked if not applicable.

Employment & Retirement

- W-2 (wages, tips, salary)
- W-2G (gambling winnings)
- 1099-R (pensions, IRA withdrawals, annuities)
- 1099-SA (HSA distributions)
- 5498-SA (HSA contributions)
- 5498 (IRA contributions)
- SSA-1099 (Social Security benefits)
- RRB-1099 (Railroad Retirement)

Self-Employment / Freelance / Contract Work

- 1099-NEC (nonemployee compensation)
- 1099-K (payment apps, online sales, gig work)
- 1099-MISC (misc income, rents, prizes)
- Business income/expenses (provide details)

Interest, Investments & Dividends

- 1099-INT (bank interest)
- 1099-DIV (dividends)
- 1099-B (stock sales or crypto sales)
- Crypto transaction statement (Coinbase, etc.)
- K-1 from partnership, S-Corp, or trust

Real Estate

- Sold a home in 2025
 - If yes, provide closing statement(s):
 - Settlement Statement (HUD-1 or Closing Disclosure)
 - 1099-S (home sale proceeds)

- Rental property income/expenses
- 1098 (mortgage interest)
- Property tax statements

Other Common Income

- Unemployment (1099-G)
- State refund (1099-G)
- Jury duty pay
- Alimony received (for pre-2019 divorce only)
- Gambling/Lottery winnings
- Prizes or awards
- Foreign income

I. Elections & Authorizations

\$3 to Presidential Campaign Fund?

Taxpayer: Yes No Spouse: Yes No

Direct Deposit / Payment Info:

Routing #: _____

Account #: _____

Type: Checking Savings

J. Health Coverage

Had health insurance all year?

Yes No

Received a 1095-A (Marketplace)?

Yes No

K. Residency & Citizenship

U.S. Citizen? Yes No

Resident Alien? Yes No

Lived in another state this year? Yes No

Foreign bank accounts (FBAR)? Yes No

Foreign income? Yes No

L. Prior-Year Information

Prior-Year AGI: _____

Prior-Year 5-digit PIN (if used): _____