JOHN'S TAX SERVICE
ESTABLISHED 1980

728 W. 11 MILE RD.
MADISON HEIGHTS, MI 48071

John's Tax & Financial Service with Paula and her staff are excited to prepare your taxes for the 2024 tax season.

As a reminder, we are not carrying forward your bank information from last year. If you wish to receive your refund by direct deposit, please be prepared to provide us your routing and account numbers.

You have the option to schedule an in-person or drop-off appointment. If you experience any illness within 48 hours of your appointment date, we ask you to call and reschedule.

Please complete the *Client Information Form* before your in-person or drop-off appointment. You can find the form on our website at jtaxfs.com

DROP OFF SERVICE – You may drop off your documents (including the client information form) or send them electronically to:

Email: jtaxfs@gmail.com
Fax: 248-546-1249

We will notify you when we receive your documents.

If you have financial investments, please check with your financial advisor(s) that you have received all of your 1099 documents before scheduling an appointment.

If you are a homeowner, your city's online municipal directory charges us to access the site. If you don't have your property tax documents and we have to look them up, a fee will be added to your tax preparation charges.

We appreciate you and have enjoyed serving you all these years. If you have any questions or concerns, please give us a call at 248-546-1735.

Sincerely,
Paula Roberts

Please see reverse side for you 2023 Tax Year Document Checklist

2023 Tax Documents Checklist

- ☐ W-2 Forms
- ☐ 1099 SSA (Social Security Benefit Statement)
- ☐ Records of Estimated Tax Payments Made to IRS and State
- ☐ 1095 A (Marketplace Healthcare Statement)
- ☐ 1098 Forms (Mortgage Interest Statement)
- ☐ 1099 R (Retirement Statement)
- ☐ 1099 MISC
- ☐ 1099 NEC
- ☐ 1098 T (Tuition Statement)
- ☐ 1098 E (Student Loan Interest Statement)
- ☐ Schedule K1
- ☐ Traditional IRA Statements
- ☐ Income Records to Verify Amounts not Reported on 1099 MISC
- ☐ Records of All Expenses
- ☐ Business Use Assets
- ☐ Office in Home Information
- ☐ 1099 INT (Interest Income)
- ☐ 1099 OID (Original Issue Discount)
- ☐ 1099 DIV (Dividents and Distributions)
- ☐ 1099 B or 1099 S - Income from sale of stocks or other property
- ☐ Date of Acquisition and Records of Your Cost or Other Basis In Property You Sold (If Basis is Not Reported on 1099 B)
- ☐ 1099 SA (Distributions from HSA)
- ☐ 1099 LTC (Long Term Care and Accelerated Death Benefits)
- ☐ Health Savings Account and Long-Term Care Reimbursements
- ☐ Transactions Involving Cryptocurrency (Virtual Currency)
- ☐ 1099 K Payment Card and Third-Party Network Transaction
- ☐ W-2G Gambling Income
- ☐ Fees Paid to Daycare
- ☐ Vehicle Registration

Please complete 1 form for each year filing

Date [ ]

Year Filing [ ]

[ ] Returning Client [ ] New Client

Client Information Form

JOHN'S TAX SERVICE

Dependent of Another
[ ] Yes [ ] No

Full Time Student
[ ] Yes [ ] No

Filing Status
[ ] Single [ ] Head of Household [ ] Married Filing Joint [ ] Married Filing Separate

Taxpayer did not live with spouse
[ ] Last 6 months of Year [ ] At All

Primary Filing Info	*Spouse Info*
Social Security Number	Social Security Number
Name	Name
Date of Birth	Date of Birth
Occupation	Occupation
Phone	Phone
E-Mail	E-Mail
Drivers License / State ID #	Drivers License / State ID#
Date Issued / Date Expires	Date Issued / Date Expires
Address	**Complete if different than Primary Filer**
City, State, Zip	Address
Name of School District	City, State, Zip

Dependents Name(s) *(If none, leave blank):*	**Relationship**	**Date of Birth**	**Social Security #**

Direct Deposit [ ] Yes [ ] No **Routing #** [ ]

Checking [ ] **Savings** [ ] **Account #** [ ]

Please write additional notes, comments, or changes on back of form • Email form and tax documents to jtaxfs@gmail.com