

**Thank you for choosing Sherlock's Income Tax Service for  
your 2025 Tax Preparation**  
**Please fill out the attached survey in full so that we can better  
serve you.**

Name:			
Social Security #		Phone Number:	
DOB		Occupation:	
Email Address:			
Spouse's Name:			
Social Security #		Phone Number:	
DOB		Occupation:	
Email Address:			
Mailing Address:			
Note:			
Check for hard copy taxes [ <input type="checkbox"/> ]		Check for Hard copy of your taxes [ <input type="checkbox"/> ]	

Dependent Information:

Name:	DOB	Social Security #	Student	Disabled

**Things to remember to include if it applies to you:**

W-2		School 1098-T		1099-INT	1099-R	
Mortgage 1099-INT				1099-MISC	1099-SSA	
Mortgage 1098		Stock 8949		Stock Information	1099-G	
Medical/ Dental Cost					Auto Registration Cost	
List of School Expenses					Current Driver's License COPY	
Gambling W2G					Union Dues Total Cost	
Unreimbursed Employment Expenses (License, Equipment, Fuel, Etc.)		Banking Account Information (Routing & Checking)				

New Vehicle Sales form, if Purchased New Vehicle		Child Care Cost Information (Need SSN or EIC #) Name Of Provider and Address	
Sale or Purchase of a Home (1099-S)			
<b>Please answer the following Questions</b>			YES
Do you have any interest in or authority over any foreign account, or foreign trust?			
At any time during 2023, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency?			
Was your main home / residency in the U.S. for more than half of the 2023 tax year?			
Can you, your spouse or your dependents be claimed as dependent on anyone else's federal income tax return for the 2023 tax year?			