

**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 []		Check for Hard copy of your taxes []	

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)			
Please answer the following Questions		YES	NO
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?			