

Tax Year to be Filed: _____ Phone # 1: _____ Phone # 2: _____ E-Mail: _____	<h2 style="margin:0;">Monty's Tax Service</h2> <p style="margin:0;">720 Belvedere Dr. Kokomo, IN 46901 765-457-5366 Office # 765-457-0462 Fax # mamcamis@comcast.net</p>	Tp _____ Sp _____ County Lived in: _____ County Worked in: _____ Are you filing Injured Spouse: _____ <i>(Injured Spouse DOESN'T owe the Debt)</i>	Have you moved since filing your 2022 tax return? <div style="text-align: center;"> Yes No </div>
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Name (Taxpayer): _____ SS #: _____ Date of Birth: _____	Estimated Taxes Paid <table style="width:100%; border-collapse: collapse;"> <tr> <td style="width:50%;"></td> <td style="width:25%; text-align: center;">Fed</td> <td style="width:25%; text-align: center;">State</td> </tr> <tr> <td>1st Qtr</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>2nd Qtr</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>3rd Qtr</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>4th Qtr</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> </table>		Fed	State	1 st Qtr	_____	_____	2 nd Qtr	_____	_____	3 rd Qtr	_____	_____	4 th Qtr	_____	_____
		Fed	State													
1 st Qtr		_____	_____													
2 nd Qtr	_____	_____														
3 rd Qtr	_____	_____														
4 th Qtr	_____	_____														
Name (Spouse): _____ SS #: _____ Date of Birth: _____																
Address: _____ City: _____ St: _____ Zip Code _____																

Filing Status:	<u>Single</u> _____	<u>Head of Household</u> _____	<u>Married Joint</u> _____	<u>Married Separate</u> (with Spouse Name): _____ Spouse SS# _____	Can you be claimed as a dependent on anyone else's tax return? Yes <input type="checkbox"/> No <input type="checkbox"/>
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Dependents Names That you are claiming	Claiming Dependent (Circle)	Claiming EIC (Circle)	Relation	Date of Birth	Age	S.S. Number	No. of Months lived with you in 2023 (Circle One)	Was in High School or College in 2023? (Circle One)	
1.	Yes / No	Yes / No					(1-5) - (7-12)	Yes	No
2.	Yes / No	Yes / No					(1-5) - (7-12)	Yes	No
3.	Yes / No	Yes / No					(1-5) - (7-12)	Yes	No
4.	Yes / No	Yes / No					(1-5) - (7-12)	Yes	No
5.	Yes / No	Yes / No					(1-5) - (7-12)	Yes	No

<u>Renters Deduction:</u> Landlord's Name: _____ Landlord's Address: _____ Number of Months Rented: _____ Rent Monthly \$ _____ Total 12 Months \$ _____	<u>Child Care or Babysitting:</u> Provider's Name: _____ Address: _____ SS# or FID # _____ Total Paid for Year: \$ _____	<u>Would you like your refund sent to:</u> Your Home ___ Checking ___ Savings ___ Bank Routing # _____ Bank Account # _____
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Was anyone on the Return a College Student in 2023?: If yes, Ask for a College form and provide the student's 1098T	Student Loan Interest: (provide the student's 1098E) Taxpayer \$ _____ Spouse \$ _____ Did you purchase Obama Care? _____ If Yes, Provide 1095 form	<u>Bring the Following:</u> Interest Statements Dividend Statements, W2's Social Security Statements Unemployment Income 1099's Stocks Sold and Basis Amt IRA Contributions K1's Misc Business Profit and Loss statements,
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I verify all the information on this, and all other papers are true. I know I am responsible for checking over my tax return.

I also agree to pay the preparation fees regardless of the return amount.

Total Property Tax you paid in 2023 \$ _____ SIGN _____ DATE _____