

CORNERSTONE TAX SERVICE

Firm Foundation, Solid Solutions



Taxpayer's Full Name: _____

Spouse's Full Name (if married): _____

Taxpayer's Social Security Number: _____

Spouse's Social Security Number: _____

Taxpayer's Date of Birth: _____

Spouse's Date of Birth: _____

Taxpayer's Occupation Title: _____

Spouse's Occupation Title: _____

Taxpayer's Mobile Phone Number: _____

Spouse's Mobile Phone Number: _____

Taxpayer's Email Address: _____

Spouse's Email Address: _____

Mailing Address (including zip code):

Home Phone Number: _____

What County did you and your spouse live in as of January 1, 2023? _____

(Indiana Residents only)

What County did you and your spouse work in as of January 1, 2023?

Taxpayer _____ Spouse _____

On December 31st were you: Single, Married, or if Married but living apart since what date _____

Is there a signed Form 8332 or a divorce decree that allows someone else to claim your children? YES NO

If you claim Head of Household, do the children live with you more than 6 months of the year? YES NO

Can your parents or someone else claim you on their return? YES NO

List all dependents (not your spouse) living with you last year. Enter DOB & SSN only for new additions only.

First Name	Last Name	Birth Date (Mo/day/year)	SSN	Relationship to you	Lived with you all year Y/N	Childcare/ Preschool Y/N	College Y/N	Private School Y/N

PLEASE CONTINUE ON BACK



Did you pay Real Estate Taxes last year? YES NO

Do you have a home equity loan or line of credit? YES NO (If it was not used solely for home improvement, it is not deductible)

Did you pay any amounts to an Ex-Spouse for alimony AND/OR maintenance for a divorce prior to 12/31/18? YES NO

If yes then enter your Former Spouse's Name & SSN _____

Did you receive any income in the form of alimony or maintenance from a divorce prior to 12/31/18? YES NO

Did you pay any Child Care Expenses (Nanny, Pre-school, before/after care) YES NO If yes, how much? _____

Name _____ Provider EIN# or SSN# _____

Provider's Address _____

Did you make any of the following Energy Improvements to your MAIN home in 2023? YES NO

QUALIFIED Doors, Windows, Skylights, Insulation, Water Heater, Furnace, AirConditioner - See Energy Star's website for requirements

QUALIFIED Solar Electric Systems, Solar Water Heaters, Fuel Cell Property, Small Wind Energy Property, or Geothermal Heat Pumps

Will you be claiming any education credits? YES NO (You must have a 1098-T)

Will you be claiming any interest paid on student loans? YES NO (You must have a 1098-E)

Any Personal Property Taxes? (Ex. Excise tax on license plates, this does not apply in IL) YES NO

Any unearned income? (Ex. Dividends from stocks, Bank Interest from savings) YES NO

Did you have Medical, Dental, or Vision expenses in excess on 7.5% of your income? YES NO

Did you make any cash contributions or non-cash donations to charities and have receipts? YES NO

Did you contribute to an IRA (Individual Retirement Account) in 2023 or will you before 4/15/2024? YES NO

If yes, was it a Roth IRA or a Traditional IRA? _____

Did you have any 1099-R Retirement Distributions? YES NO

Did you have any self-employment income? YES NO

Did you sell any stocks or bonds? YES NO

Did you receive, sell, exchange, or dispose of any financial interest in digital assets (ie. Cryptocurrency, BitCoin?) YES NO

Did you have any rental property income? YES NO

Did you have any Social Security income? YES NO

Are there any years that you did not file your taxes? YES NO

If Yes, what years haven't been filed? _____

Did you send in Quarterly Estimated Federal or State tax payments? YES NO

Did you buy a vehicle, building materials, boat or make any other LARGE purchase incurring a LARGE amount of sales tax? YES NO

(Indiana Residents only)

Did you pay rent? YES NO If yes, how many months did you pay rent? _____

How much was your monthly rent? \$ _____

Landlord's Name _____

Landlord's Address _____

Cornerstone Tax Service, Inc. (Accountant) will prepare our personal or corporate income tax returns based on information we will present to the accountant. Cornerstone Tax Service, Inc. will perform due diligence but will not audit or otherwise verify the data we submit. The accountant may ask us for clarification of some of the information, or for additional information. It is the accountants responsibility to prepare our tax return correctly according to the law and the information that we have provided. It is our responsibility to provide the accountant with all the information required to prepare complete and accurate returns. Our tax return cannot be filed until all forms are signed and returned to the office. I declare that to the best of my knowledge and belief what is stated above is correct, complete and is truly stated.

Taxpayer's Signature _____ Date _____

Spouse's Signature _____ Date _____