

Selk Dawson Tax Services, LLC

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Acorn Financial Group

Taxpayer's Name: Soc. Sec. #: Birthday:
 Driver's Lic #: Issued: Expires:
 Spouse's Name: Soc. Sec. #: Birthday:
 Driver's Lic #: Issued: Expires:
 Address: City: State: Zip:

IA Residents - What school district did you live in on December 31st:

Taxpayer's Cellular #: Spouse's Cellular #:

Home Telephone #:

Taxpayer's E-Mail: Spouse's E-Mail:

Dependents --- child, parent, other who lived with you

Name (first and last)	Soc. Sec. #	Birthday	Relationship

Child Care --- if in a flex program at work you still must provide this information

Provider's Name	Address	Soc. Sec. # or EIN	Amount

Statements Needed

- W-2's
- Social Security statements
- Pension/IRA statements (1099-R)
- Unemployment statements
- Sales of stocks/bond statement (1099-DIV)
- Gambling winning statements (W2-G)
- 1099 NEC / MISC / INT statements
- Health Savings Account 1099SA
- 1095-A Health Insurance Form
- 1099-K Credit Card or 3rd Party Income
- Prior Year State refund
- Prior Year Federal refund
- Alimony received
- Any K-1's

Interest Earned --- bring these statements

Financial Institution	Amount

Dividends Earned --- bring these statements

Financial Institution	Amount

Did you get into or out of a **digital asset** (ie: virtual currency, NFT's, etc.) this year?

Do you want to earmark any of your taxes to help run a presidential campaign? Checking "Yes" will not change your tax owed or your refund. You are just telling them how to use your tax dollars. **Taxpayer** **Yes** **Spouse** **Yes**
 On your state return do you want to donate to any of Iowa's special projects? If you indicate you do, this will reduce your refund or increase what you owe.

Fish/Wildlife: amount _____ **Child Abuse Prevention: amount** _____

