

# Individual Tax Preparation Estimate

Please complete this form to receive a tax preparation fee estimate.

**Is this an Individual or Joint return?**

Individual      Joint

**What type of income do you have?**

W-2's

Retirement Income

1099-Misc

Investment Income - stock trades, investment accounts

Self Employment (Sole Proprietor or Single Member LLC)

Income from Partnerships or S-Corps

Direct Seller (Avon, Mary Kay, Energy Broker etc)

Rental Income

Shared/Gig Economy (Uber, Lyft, AirBNB)

**If you checked Partnership or S-Corps, how many K-1's do you expect to receive?**

**If you are self employed, please describe your business and whether you will need help compiling your business records.**

**Do you typically itemize deductions (Property taxes, mortgage interest etc)?**

Yes • No

**Do you claim, home office deductions?**

Yes • No

**Will you be claiming tuition or education credits for yourself or any of your dependents?**

Yes • No

**Will you claim a child under the age of 17?**

Yes • No

**Will you claim a dependent other than a child?**

Yes • No

**Do you expect to qualify for the Earned Income Tax Credit?**

Yes • No

**Do you have a filing requirement in a state other than Texas?**

Yes • No

**Please provide any other information you feel we would need to know in order to provide you with a realistic quote.**

**Please provide your name**

First

Last

**Please provide an email address where we can send your quote:**

**Optional: Please provide a phone number where you can be reached should we have follow-up questions**