



Ferguson Financial Solutions Client Data Sheet

TAXPAYER NAME: _____ SPOUSE NAME: _____

SSN: _____ DOB: _____ SSN: _____ DOB: _____

OCCUPATION: _____ OCCUPATION: _____

EMAIL: _____ EMAIL: _____

MAILING ADDRESS: _____ APT#: _____

CITY: _____ STATE: _____ ZIP: _____

MAIN PHONE: _____ ALT PHONE: _____

Did you receive the AK PFD? Y / N

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If NO, was it due to garnishment? Y / N

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Dependents: Full Name	Date of Birth	SSN	Relationship to you	Months in home	PFD Y/N

PLEASE ANSWER YES OR NO TO ALL THAT APPLY		Y	N
Can someone else claim you as a dependent?			
Did you have health insurance through the Marketplace?			
Did you make <i>estimated</i> payments to the IRS last year? Amount: \$ _____			
Did you or your spouse live or work in another state last year?			
Were you a student, had education expenses, or made student loan payments?			
Were you self-employed?			
Did you receive Alimony? Payor's SSN: _____ - _____ - _____ Date of Divorce: ____/____/____			
Did you pay Alimony? Recipient's SSN: _____ - _____ - _____ Date of Divorce: ____/____/____			
Did you receive (as a reward, award, or compensation), sell, exchange, gift, or otherwise dispose of a digital asset (or financial interest in a digital asset)? Examples of digital assets include virtual currency (Cryptocurrency, Bitcoin, Ethereum), NFTs (Bored Ape Yacht Club, digital representation of artwork or deed to a house).			

SELECT THE INCOME ITEMS THAT APPLY TO YOU

- W-2 Wages
- Misc. Income (1099)
- Gambling Winnings
- Sold stocks or bonds
- Interest
- Unemployment
- Pension/Retirement
- Sold a house or land
- Dividends
- Digital Assets (Crypto, NFT)
- Social Security or Disability Benefits
- Sold business property

Would you like your refund direct deposited into your bank account? Y / N

Checking Savings Routing #: _____ Account #: _____

I CERTIFY THAT I WOULD LIKE MY TAXES PREPARED ACCORDING TO THE INFORMATION I SUPPLIED ON THIS CLIENT DATA SHEET

Taxpayer's Signature: _____ Date: _____

Spouse's Signature: _____ Date: _____

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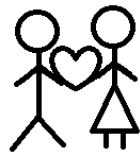
PLEASE CHOOSE A FILING STATUS FROM THE OPTIONS BELOW

SINGLE =



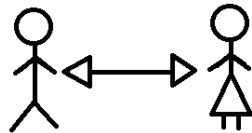
Unmarried, with or without children/dependents

MARRIED FILING JOINTLY =



Married & filing with spouse

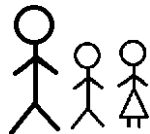
MARRIED FILING SEPARATELY =



Married, but file separate returns

Did you live together at any time during the year? **Y / N**

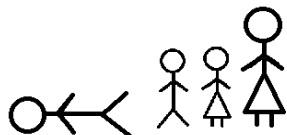
HEAD OF HOUSEHOLD =



1. Unmarried with dependents
2. Married with children **AND** lived apart from your spouse for the last 6 months of the year

(Must have paid over half the cost of keeping up the home)

QUALIFYING



SURVIVING SPOUSE =

Spouse is deceased **AND** you have child(ren) in the home
(Qualifies for the 2 consecutive years after year of death if child(ren) are in the home **AND** you have not remarried)

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Taxpayer's Signature: _____ Date: _____

Spouse's Signature: _____ Date: _____