GREGG
THE TAX GUY
FEDERAL & STATE INCOME TAX PREPARATION
SINCE 1995

BEFORE WE BEGIN

Fees, Payment Options & Important Tax Documents

Thank you for choosing Gregg The Tax Guy. Clear expectations and communication help make tax preparation a smooth experience. Please review the payment information below before sending payment.

PREPARATION FEES & ADVANCE PAYMENT

$250 per tax year includes preparation of your federal income tax return, **Schedule C, if applicable, and all applicable state income tax returns** for that same year. **City and local tax returns are not included.**

Payment is required in advance, before I begin preparing your tax returns.

Amended returns: $100 for Form 1040-X when a return I prepared must be amended because information was not provided to me. This fee applies to that specific situation; please contact me about other amendment circumstances.

Preparation fees are separate from taxes owed to the IRS or a state. The fee does not depend on whether you receive a refund or owe tax; a particular tax result is not guaranteed.

PAYMENT METHODS - IN ORDER OF PREFERENCE

1. Zelle - preferred

Send to **913-280-3266**. Zero fees to both of us.

2. Venmo

Send to **@greggismyname**.

3. Check

Make your check payable to **Gregg Katz** or **Gregg The Tax Guy**.

4. Credit card

Your online invoice comes from **Gregg The Tax Guy**. Pay through the invoice link. **I cover the processing fees; they are not passed on to you.**

IMPORTANT: PROVIDE EVERY AVAILABLE TAX DOCUMENT

Please provide every tax document you receive for the year before I e-file your return. Include all W-2s, 1099s, Social Security statements, brokerage statements and corrected forms, even if you are unsure whether they matter. Tell me if you are still waiting for a document.

Especially important: Form 1095-A, Health Insurance Marketplace Statement. If you, your spouse or a dependent had Marketplace coverage, provide every applicable 1095-A, including corrected forms. I use it to prepare Form 8962 when required. **The IRS can reject an e-filed return if its records show required premium-tax-credit reconciliation but Form 8962 is missing.**

Other missing documents may cause processing delays, later IRS notices or an amended return. If a document arrives after you submit your records, send it to me promptly. You can obtain a missing 1095-A through your Marketplace account.

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CLIENT INTAKE FORM FOR PERSONAL & SCHEDULE C INCOME TAXES

This form helps Gregg Katz prepare your income tax returns. Complete it on your device or print and fill it out by hand. When finished, email **info@greggthetaxguy.com** to request your secure upload link. Gregg will send a link to upload this form and other tax documents to a secure online vault. If you are unable or unwilling to use the vault, you can print the completed form and present it to Gregg. Questions? Call **913-280-3266** (cell). **Pages 2-4 are the most important part of this form. Complete them as fully as possible.** Save your completed form. Pages 5 through the end are primarily a guide to records and information to look for before tax preparation. Fill them out only if you have the applicable information; leave other items blank.

01 PRIMARY TAXPAYER

First name | **Middle initial** | **Last name**

Social Security number (SSN) | **Date of birth (MM/DD/YYYY)**

Filing status (check one)
- ☐ Single
- ☐ Married filing jointly
- ☐ Qualifying surviving spouse
- ☐ Head of household
- ☐ Married filing separately

Home street address | **Apt. / unit #**

Worked remotely?
☐ Yes ☐ No

City | **State** | **ZIP code** | **Remote % of work**

Phone / cell number | **Email address** | **Occupation**

Driver's license / State ID # | **Issuing state** | **Issue date (MM/DD/YYYY)** | **Expiration (MM/DD/YYYY)**

☐ No state-issued ID

02 SECONDARY TAXPAYER / SPOUSE (IF APPLICABLE)

First name | **Middle initial** | **Last name**

Social Security number (SSN) | **Date of birth (MM/DD/YYYY)**

Filing status (check one)
- ☐ Single
- ☐ Married filing jointly
- ☐ Qualifying surviving spouse
- ☐ Head of household
- ☐ Married filing separately

Home street address | **Apt. / unit #**

Worked remotely?
☐ Yes ☐ No

City | **State** | **ZIP code** | **Remote % of work**

Phone / cell number | **Email address** | **Occupation**

Driver's license / State ID # | **Issuing state** | **Issue date (MM/DD/YYYY)** | **Expiration (MM/DD/YYYY)**

☐ No state-issued ID

Remote work: State credits/refunds may require employer verification. See the note on page 7.

DEPENDENT INFORMATION

List your dependents and check all applicable statements for each person.

03 DEPENDENTS

DEPENDENT 1

First name | **Last name**

SSN | **DOB (MM/DD/YYYY)**

Relationship

- ☐ Lived with you more than half the tax year
- ☐ Lived with you in the U.S. more than half the year
- ☐ Full-time student
- ☐ Permanently and totally disabled

Could someone else claim this person? ☐ Yes ☐ No

DEPENDENT 2

First name | **Last name**

SSN | **DOB (MM/DD/YYYY)**

Relationship

- ☐ Lived with you more than half the tax year
- ☐ Lived with you in the U.S. more than half the year
- ☐ Full-time student
- ☐ Permanently and totally disabled

Could someone else claim this person? ☐ Yes ☐ No

DEPENDENT 3

First name | **Last name**

SSN | **DOB (MM/DD/YYYY)**

Relationship

- ☐ Lived with you more than half the tax year
- ☐ Lived with you in the U.S. more than half the year
- ☐ Full-time student
- ☐ Permanently and totally disabled

Could someone else claim this person? ☐ Yes ☐ No

DEPENDENT 4

First name | **Last name**

SSN | **DOB (MM/DD/YYYY)**

Relationship

- ☐ Lived with you more than half the tax year
- ☐ Lived with you in the U.S. more than half the year
- ☐ Full-time student
- ☐ Permanently and totally disabled

Could someone else claim this person? ☐ Yes ☐ No

☐ More than four dependents (provide an additional list with this form)

Received IRS or state tax notices / letters? If yes, provide copies. ☐ Yes ☐ No

OTHER INFORMATION YOU BELIEVE GREGG NEEDS TO KNOW ABOUT

E-FILING, REFUNDS & TAX PAYMENTS

04 ELECTRONIC FILING

Unless otherwise requested, all tax returns for the current tax year will be e-filed. Provide your prior-year AGI and five-digit e-file PIN, if available. The six-digit IP PIN is separate: request or retrieve it through your IRS.gov account and provide the current calendar-year IP PIN if issued. If a PIN is unknown, Gregg will confirm the information and signature authorization needed to e-file. Do you have a copy of your prior-year tax return? If so, please provide it to Gregg.

☐ I request paper filing instead of e-filing.

PRIMARY TAXPAYER

Prior AGI ($): see note	1040 line 16: Tax ($)	Line 24: Total tax ($)	Prior e-file PIN (5 digits)	Current IP PIN (6 digits)

Prior-year Form 1040 AGI: 2025 line 11a (also 11b); 2024 line 11. Tax: use lines 16 and 24, not payments or amount owed.

SECONDARY TAXPAYER / SPOUSE (IF APPLICABLE)

Prior AGI ($): see note	1040 line 16: Tax ($)	Line 24: Total tax ($)	Prior e-file PIN (5 digits)	Current IP PIN (6 digits)

If you filed jointly last year, repeat the full joint AGI and tax amounts for both people; do not split them. Attach the prior return.

05 BANK ACCOUNT FOR REFUND / PAYMENT

If you are getting a refund, provide the bank account below for direct deposit. If you owe tax, select a payment method separately for the IRS and your state. Choosing bank withdrawal for both uses this account for both payments. Verify all bank information before submitting this form.

Bank / financial institution

Name(s) on account

Routing number (9 digits)

Account number

Account type (check one)

☐ Checking

☐ Savings

IRS / federal payment method (check one)

☐ Bank withdrawal ☐ Check later

☐ Online later ☐ No balance due

State payment method (check one)

☐ Bank withdrawal ☐ Check later

☐ Online later ☐ No balance due

State(s) for payments / estimates

Requested IRS debit date (MM/DD/YYYY)

Requested state debit date (MM/DD/YYYY)

Leave debit dates blank if unsure; Gregg will confirm them before filing. For timely IRS returns, request a date no later than the payment deadline; late returns and states have separate rules.

06 ESTIMATED & EXTENSION PAYMENTS ALREADY MADE

Payment type	IRS amount ($)	IRS date MM/DD/YYYY	State amount ($)	State date MM/DD/YYYY
Estimated payment 1				
Estimated payment 2				
Estimated payment 3				
Estimated payment 4				
Extension payment				
Prior-year refund applied to this year				

INCOME DOCUMENT CHECKLIST

Before your taxes are prepared, gather all income documents for you and your spouse, including corrected forms and every page of consolidated statements. Include income records even when you did not receive a tax form. Pages 2-4 remain the priority.

Optional: fill out only what you know. Use this page as a guide to records to look for.

- [ ] **W-2 / W-2c** - Wages, salary, bonuses and employer-reported tips from every employer.
- [ ] **SSA-1099 / RRB-1099** - Social Security and railroad retirement benefit statements.
- [ ] **1099-R / RRB-1099-R** - Pensions, annuities, IRA withdrawals, rollovers and retirement distributions.
- [ ] **1099-INT / 1099-OID** - Bank, bond and other interest; include tax-exempt interest records.
- [ ] **1099-DIV** - Dividends, capital-gain distributions and investment distributions.
- [ ] **1099-B / consolidated brokerage statement** - Sales of stocks, bonds and funds; include purchase costs.
- [ ] **1099-G** - Unemployment compensation, state/local tax refunds and other government payments.
- [ ] **1099-NEC** - Independent contractor, freelance, consulting and gig-work payments.
- [ ] **1099-MISC** - Rent, royalties, prizes, awards and other miscellaneous payments.
- [ ] **1099-K** - Payment-app, card processor and marketplace records; identify transfers and refunds.
- [ ] **Business / side-job income** - All sales and receipts, including cash, checks, tips and platform payments.
- [ ] **Rental property income** - Rent collected, security-deposit activity and property-by-property records.
- [ ] **Schedule K-1** - Partnership, S corporation, estate and trust income; include supplemental statements.
- [ ] **W-2G / gambling winnings** - Casino, lottery and sports-betting statements and activity logs.
- [ ] **Digital assets / 1099-DA, if received** - Sales, exchanges, staking/rewards and transaction history with costs.
- [ ] **1099-S / property sales** - Closing statements, purchase/improvement costs and dates for property sold.
- [ ] **1099-C / 1099-A** - Debt cancellation, foreclosure or repossession records for Gregg to review.
- [ ] **Alimony received** - Amounts and the divorce/separation agreement, including amendments.
- [ ] **Other income** - Jury duty, hobby activity, taxable scholarships, awards and other receipts.

Also provide your prior-year federal and state returns, estimated-tax payment records, and any IRS or state tax notices. Gregg will determine how each item is reported.

PERSONAL EXPENSES & OTHER RECORDS

Gather receipts, statements and payment summaries. Enter amounts where requested. From Mortgage Interest onward, check Yes if you have the item or records, or No if not; leave unknown answers blank. Business expenses are on page 8. Gregg will review eligibility and limits.

Optional: fill out only what you know. Use this page as a guide to records to look for.

Amount, if known

- ☐ **Medical / dental** - Unreimbursed doctor, dentist, hospital, prescription and eligible care costs. $ _____
- ☐ **Health premiums / medical travel** - Amounts paid personally, reimbursement details and medical mileage. $ _____
- ☐ **Real estate taxes** - Property-tax bills and amounts actually paid; include escrow tax disbursements. $ _____
- ☐ **State / local income or sales tax** - Withholding, estimated payments or sales-tax records for review. $ _____
- ☐ **Personal property taxes** - Vehicle or other property-tax statements showing the tax basis. $ _____

Mortgage interest / Form 1098 - Every lender statement, loan balances and refinance/closing documents.	☐ Yes	☐ No
Investment interest - Margin or investment-loan interest statements.	☐ Yes	☐ No
Charitable cash gifts - Receipts, bank records and acknowledgments for cash, check or online gifts.	☐ Yes	☐ No
Noncash charitable gifts - Donation dates, descriptions, values and receipts; appraisals if available.	☐ Yes	☐ No
Charitable carryovers - Prior-return schedules for donations carried forward.	☐ Yes	☐ No
Disaster / casualty losses - Damage, insurance reimbursement and repair/appraisal documentation.	☐ Yes	☐ No
Education / Forms 1098-T and 1098-E - Tuition, required course materials and student-loan interest statements.	☐ Yes	☐ No
Child / dependent care - Provider name, address, tax ID and amounts paid for each dependent.	☐ Yes	☐ No
HSA / medical savings accounts - Forms 1099-SA and 5498-SA, contributions and qualified-expense records.	☐ Yes	☐ No
IRA / retirement contributions - Contribution confirmations, amounts and dates, including Form 5498.	☐ Yes	☐ No
Marketplace health coverage - Form 1095-A for every policy, including corrected statements.	☐ Yes	☐ No
Other possible deductions / credits - Educator costs, adoption, energy improvements and supporting invoices.	☐ Yes	☐ No

Keep personal and business totals separate. Provide rental-property expenses by property. Include receipts and descriptions for other items you would like Gregg to review.

LIFE CHANGES & BUSINESS DETAILS

Optional: complete only if you have the information. Use this page as a guide to records to look for.

07 DEPENDENCY & CHANGES DURING THE YEAR

Can someone else claim you or your spouse as a dependent? Check one for each.

Primary taxpayer ☐ Yes ☐ No Spouse, if applicable ☐ Yes ☐ No

Check any changes during the year, then provide dates and details below.

☐ Marriage ☐ Divorce / separation ☐ Birth / adoption

☐ Death in family ☐ Moved / changed address ☐ Lived / worked in another state

Dates, people affected, states involved and other details

08 SCHEDULE C BUSINESS PROFILE (IF APPLICABLE)

Business name (or your name if no separate name)

Business owner name

Business activity / services or products

EIN, if applicable

Business status (check all that apply)

☐ Ongoing ☐ Started / acquired this year ☐ Closed / sold this year

Start / closure date(s), if applicable (MM/DD/YYYY)

Additional business(es): attach separate profiles

09 BUSINESS VEHICLE & MILEAGE (IF APPLICABLE)

Vehicle year / make / model

Business in-service date (MM/DD/YYYY)

Total miles driven

Business miles

Commuting miles

Other / personal miles

Vehicle ownership (check one) ☐ Owned ☐ Leased

Do you have a written mileage log? ☐ Yes ☐ No

Business, commuting and other miles should add up to total miles. Provide your mileage log, vehicle purchase/lease documents and expense records. For additional vehicles or businesses, attach a separate summary.

Remote work: Some states may deny or delay related credits or refunds until they receive an employer verification letter. Provide a signed employer letter confirming work locations, remote-work dates and the percentage of work performed remotely. Rules vary by state; Gregg will review your situation.

BUSINESS EXPENSES - SCHEDULE C

For each sole-proprietor or freelance business, gather annual totals and supporting records in the category order below. Include the business name and income summary. Report business-use amounts separately from personal use. Enter dollar amounts if known. Gregg will review tax treatment.

Optional: fill out only what you know. Use this page as a guide to records to look for.

Amount, if known

- ☐ **Advertising** - Ads, marketing and promotion. $ _____
- ☐ **Car and truck** - Complete vehicle details on page 7; gather mileage and vehicle-cost records. $ _____
- ☐ **Commissions and fees** - Sales commissions, platform charges and processing fees. $ _____
- ☐ **Contract labor** - Payments to nonemployees, recipient details and Forms 1099 filed. $ _____
- ☐ **Depletion** - Natural-resource production and cost records, if applicable. $ _____
- ☐ **Depreciation / section 179** - Equipment and asset purchases, dates, costs and prior asset schedules. $ _____
- ☐ **Employee benefit programs** - Employer-paid benefit costs, separate from pension plans. $ _____
- ☐ **Insurance other than health** - Business insurance policies and premium totals. $ _____
- ☐ **Mortgage interest** - Business-property lender statements. $ _____
- ☐ **Other interest** - Business borrowing statements. $ _____
- ☐ **Legal and professional services** - Attorney, accountant and other professional bills. $ _____
- ☐ **Office expense** - Office-related operating purchases. $ _____
- ☐ **Pension and profit-sharing plans** - Employer plan contributions and plan records. $ _____
- ☐ **Vehicle / machinery / equipment rent** - Lease statements and business-use allocation. $ _____
- ☐ **Other business-property rent** - Office, storefront, workspace or storage payments. $ _____
- ☐ **Repairs and maintenance** - Service bills; identify improvements separately. $ _____
- ☐ **Supplies** - Consumables, separate from inventory and resale items. $ _____
- ☐ **Taxes and licenses** - Business taxes, registrations and license fees. $ _____
- ☐ **Travel** - Business-trip dates, purpose, transportation and lodging receipts. $ _____
- ☐ **Meals** - Receipts, attendees and business purpose; separate from travel totals. $ _____
- ☐ **Utilities** - Business phone, internet, electricity and other utility statements. $ _____
- ☐ **Wages** - Payroll summaries and employment-credit records. $ _____
- ☐ **Commercial-building energy deduction** - Project/certification records, if applicable. $ _____
- ☐ **Other expenses** - Itemized category totals for business costs not listed above. $ _____
- ☐ **Business use of home** - Complete home-office details on pages 9-10; avoid duplicate totals. $ _____
- ☐ **Inventory / cost of goods sold** - Beginning/ending inventory, purchases, labor, materials and other product costs. $ _____

Additional records: Asset sales, business start/closure details and self-employed health premiums. Keep inventory costs separate from operating expenses.

HOME OFFICE - SPACE & BUSINESS USE

Optional: complete what you know for each home used in your Schedule C business. Attach separate details for additional homes, offices or businesses. Gregg will determine eligibility and whether the actual-expense or simplified method applies.

10 HOME-OFFICE INFORMATION

Business / taxpayer using this office

Home-office address (including unit)

Total home area (square feet)

Business-only area (square feet)

Other areas / size changes during year

Date business use began (MM/DD/YYYY)

Date ended, if applicable (MM/DD/YYYY)

Home is (check one): ☐ Owned ☐ Rented

Is the space used regularly for this business? ☐ Yes ☐ No

Is this space used only for business (no personal use)? ☐ Yes ☐ No

Is this your main place of business? ☐ Yes ☐ No

Do you do substantial administrative / management work elsewhere? ☐ Yes ☐ No

Do you regularly meet clients, customers or patients here? ☐ Yes ☐ No

Other use / exceptions for Gregg to review (check all that apply):

☐ Separate unattached business structure

☐ Inventory / product-sample storage

☐ Daycare (provide hours, days, areas used and licensing records)

11 HOME BASIS & PRIOR-YEAR RECORDS

Purchase date, if owned (MM/DD/YYYY)

Original home cost ($)

Land portion of cost ($), if known

Improvements: description, cost and date (attach list if needed)

Fair market value at business-use start ($)

Land portion of that value ($), if known

Prior-year home-office method (check one, if known):

☐ Actual expenses

☐ Simplified

☐ Not previously claimed / unknown

Provide prior Forms 8829, home depreciation schedules and unused deduction carryovers. Include purchase/closing documents, improvement records, a floor plan or measurements, and details of any move, home sale, shared office or change in business use.

HOME OFFICE - EXPENSES & RECORDS

Optional: enter amounts if known and gather supporting bills. Use amounts for the period the home was used for business. Enter full whole-home costs before any office percentage. Exclude office-only costs from whole-home totals; Gregg will allocate and review the deduction.

12 HOME-OFFICE COSTS (ACTUAL EXPENSE RECORDS)

Expense / record	Whole-home cost ($)	Office-only cost ($)
Rent (if rented)		
Mortgage interest - Forms 1098		
Real estate taxes paid		
Homeowners / renters insurance		
Electricity / gas / heating fuel		
Water / sewer / trash		
Repairs and maintenance (not improvements)		
Security / monitoring		
Cleaning and other home services		
Casualty losses / insurance recoveries - attach details		
Other home costs - attach description		

Internet / business phone: total, business portion and explanation (attach bills)

Reimbursements / amounts paid by others (describe and give amounts)

13 SUPPORTING INFORMATION TO GATHER

- [ ] Annual statements, receipts and payment records for the costs above
- [ ] Home purchase, land allocation, improvement and valuation records
- [ ] Prior home-office forms, depreciation records and carryover schedules
- [ ] Business-use dates, measurements and records of changing / shared space

Do not count the same cost twice as a Schedule C expense or personal deduction. List capital improvements separately from repairs. For daycare, storage exceptions or multiple homes/businesses, provide details so Gregg can apply the appropriate rules.