



# Aspen 2024 Tax Info Sheet

DATE: \_\_\_\_\_ EMAIL: \_\_\_\_\_

PERSONAL PHONE NUMBER: \_\_\_\_\_ TEXTING: \_\_\_ YES \_\_\_ NO

\_\_\_ SINGLE \_\_\_ HEAD OF HOUSEHOLD \_\_\_ MARRIED FILING JOINTLY \_\_\_ MARRIED FILING SEPERATELY

\_\_\_\_\_  
FIRST NAME MI LAST NAME SS # DOB OCCUPATION

SPOUSE

\_\_\_\_\_  
FIRST NAME MI LAST NAME SS # DOB OCCUPATION

MAILING ADDRESS

\_\_\_\_\_  
ADDRESS: CITY STATE ZIP CODE

DEPENDENTS

\_\_\_\_\_  
FIRST NAME MI LAST NAME SS # DOB RELATIONSHIP

DIRECT DEPOSIT INFORMATION (FOR REFUNDS)

\_\_\_\_\_  
BANK NAME ROUTING # ACCOUNT # TYPE OF ACCOUNT  
(CHECKING/SAVINGS)

HAVE YOU MADE ANY ESTIMATED TAX PAYMENTS?

\_\_\_\_\_  
2023 OVERPAID 1<sup>ST</sup> PMT 2<sup>ND</sup> PMT 3<sup>RD</sup> PMT 4<sup>TH</sup> PMT

\_\_\_\_\_  
FEDERAL

\_\_\_\_\_  
OTHER STATE

DOCUMENTS:

\_\_\_\_\_  
Copies of ID's \_\_\_\_\_ W-2s \_\_\_\_\_ 1099s \_\_\_\_\_ 1098s  
\_\_\_\_\_  
BROKERAGE STMTS \_\_\_\_\_ Rental Properties \_\_\_\_\_ Gambling (W2-Gs)  
\_\_\_\_\_  
K-1s \_\_\_\_\_ Aspen 2024 Tax Info Sheet \_\_\_\_\_ Insurance FORM 1095

