

CLIENT – HOA TAX RETURN INTAKE FORM

Do you typically owe taxes? ___ Did you owe state or federal last year? _____

Client Name: _____ HOA's Name: _____

HOA's Email: _____ HOA's Phone: _____

HOA's Address: _____

List of Board Members and positions:

_____ Name	_____ Position
_____ Name	_____ Position
_____ Name	_____ Position
_____ Name	_____ Position
_____ Name	_____ Position
_____ Name	_____ Position

NEW Clients – Do you have a copy of the previous tax return? Yes / No

Do you have any interest or investment income and copies to include? Yes / No

Do you have copies of all 1099-NECs issued by the HOA? Yes / No