

# LATIN SERVICES

\$\$\$ INTERVIEW WORKSHEET \$\$\$  
TAX YEAR - 2023

Name: \_\_\_\_\_ S.S or ITIN \_\_\_\_\_  
Spouse: \_\_\_\_\_ S.S or ITIN \_\_\_\_\_  
Address: \_\_\_\_\_ City \_\_\_\_\_ Zip Code \_\_\_\_\_  
Cell: \_\_\_\_\_ Home: \_\_\_\_\_

Dependent's Name	Social Security #	Relationship	D.O.B

Routing Number \_\_\_\_\_  W2  1099 - G  S.S. Benefits  
 S.S. Card  1099 - R  Property Tax  
Accounting Number \_\_\_\_\_  ID'S  1098 - T  Interest Mortgage  
 ITIN's  1095 - A  Form - 6475  
Federal Total Refund \_\_\_\_\_  1099 - INT  1095 - B / C  Form - 6419  
 1099-MISC  Foreign AC  List of Expenses  
State Total Refund \_\_\_\_\_  1099 - NEC  Crypto  Form FTB 3895

I HEREBY CERTIFY THAT THE DATA THAT I PROVIDED IS CORRECT AND THAT NO WAY DID THE PREPARER OR ASSISTANT ADD OR SUGGESTED ANY KIND OF FALSE INFORMATION THAT COULD CHANGE MY TAX

Information Provided By: \_\_\_\_\_ Date: \_\_\_\_\_  
(Signature)

INTERNAL USE ONLY

Receipt # \_\_\_\_\_ Preparation Fee \_\_\_\_\_  
Payment Date: \_\_\_\_\_ Payment Type \_\_\_\_\_