

# Start Your Tax Return – First Family Trust

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## SECTION 1 — PERSONAL INFORMATION

Full Legal Name:

Email Address:

Phone Number:

Date of Birth:

Last 4 of SSN:

## SECTION 2 — FILING STATUS

Check one:      ☐ Single      ☐ MFJ      ☐ MFS      ☐ HOH      ☐ QW

Dependents (Names, DOB, Relationship):

# Income, Credits, Banking & Notes

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## SECTION 3 — INCOME DOCUMENTS (Check all that apply)

W-2

1099-NEC

1099-MISC

1099-K

1099-G

SSA-1099

1099-R

1099-INT/DIV

Rental

Self-Employment

Cash Income

Other

If Other, Explain:

## SECTION 4 — CREDITS & DEDUCTIONS

Childcare:

Yes

No

College Tuition (1098-T):

Yes

No

Student Loan (1098-E):

Yes

No

Homeowner:

Yes

No

## SECTION 5 — DIRECT DEPOSIT INFORMATION

Bank Name:

Routing Number:

Account Number: