MELANATED PRESTIGE TAX CO.

TAX YEAR: 2026

1 | TAXPAYER INFORMATION

Full legal name

Date of birth

SSN / ITIN

Phone number

Email address

Occupation

Mailing address

City / State / ZIP

2 | FILING STATUS & HOUSEHOLD

- ☐ Single
- ☐ Married filing jointly
- ☐ Married filing separately
- ☐ Head of household
- ☐ Qualifying surviving spouse

- ☐ Paid over half the cost of keeping up the home
- ☐ Married as of December 31

3 | DEPENDENTS

List dependents below; attach additional details if needed.

Dependent full name | **DOB** | **SSN / ITIN**

Relationship | **Months lived with you**

Dependent full name | **DOB** | **SSN / ITIN**

Relationship | **Months lived with you**

3 | DEPENDENTS (CONTINUED)

Complete the additional dependent sections below. Four total dependent sections are provided.

DEPENDENT 3

Full legal name

Date of birth

SSN / ITIN

Relationship

Months lived with you

DEPENDENT 4

Full legal name

Date of birth

SSN / ITIN

Relationship

Months lived with you

Provide supporting dependent documents if requested by your tax preparer.

4 | INCOME SOURCES (CHECK ALL THAT APPLY)

- ☐ W-2 wages
- ☐ 1099-NEC / business income
- ☐ 1099-K / payment apps
- ☐ Unemployment
- ☐ Retirement / pension
- ☐ Social Security benefits
- ☐ Rental income
- ☐ Interest / dividends
- ☐ Other income
- ☐ Cash income not on a form

5 | SELF-EMPLOYMENT / SCHEDULE C

Business name

Business type

Gross business receipts

Business expenses

- ☐ I have income and expense records
- ☐ I used a vehicle for business
- ☐ I paid contractors
- ☐ I have home office expenses

6 | CREDITS & DEDUCTIONS

- ☐ Childcare expenses
- ☐ College tuition
- ☐ Student loan interest
- ☐ Mortgage interest
- ☐ Charitable contributions
- ☐ Medical expenses
- ☐ Marketplace insurance (1095-A)
- ☐ Estimated tax payments

7 | IRS & TAX HISTORY

- ☐ Received IRS notices
- ☐ Previously audited
- ☐ Owe back taxes
- ☐ Have an IRS IP PIN
- ☐ Filed a return last year

Please provide copies of relevant notices, tax forms, and supporting records.

8 | REFUND PREFERENCES

- ☐ Direct deposit
- ☐ Paper check
- ☐ Interested in refund advance

Bank name

Account type (checking / savings)

Routing number

Account number

Refund advances are subject to lender approval and applicable terms.

9 | REQUIRED DOCUMENTS & CLIENT TASKS

- ☐ Photo ID and Social Security / ITIN documents
- ☐ All W-2s, 1099s and other income records
- ☐ Dependent supporting documents, if requested
- ☐ Business income and expense records, if applicable
- ☐ IRS letters and IP PIN, if applicable
- ☐ Complete intake and upload documents securely
- ☐ Review return and sign required authorizations

10 | CLIENT CERTIFICATION

I certify that the information provided is true, accurate, and complete to the best of my knowledge. I understand that additional documentation may be required, and I am responsible for reviewing my return before signing.

Client signature (typed name)

Date

Submit through your Melatax client portal unless filing in person.