MARY C. KENNEY
CERTIFIED PUBLIC ACCOUNTANT

2023	1040	US	Client Information		1

Resident Status	Resident state as of 12/31/23	(2)	
	1=full year resident	(1)	
	1=multi-state return	(1)	
	State return(s) (i.e. CA, NY, etc.)		
Electronic return(s) (i.e. US, CA, NY, etc.)			

Filing Status	Filing status (see table)	(1)	
	1=MFJ versus MFS comparison	(1)	
	1=married filing separate and lived with spouse	(1)	
	1=married filing separate and must itemize deductions	(1)	
	Year spouse died, if qualifying surviving spouse	(4)	

Taxpayer	First name and initial	(20)	
	Last name	(20)	
	Title/suffix	(5)	
	Social security no.	(11)	
	Occupation	(25)	
	Date of birth (m/d/y)	(8)	
	Date of death (m/d/y)	(8)	
	Dependency status (table)	(1)	
	1=blind	(1)	

Spouse	First name and initial	(20)	
	Last name	(20)	
	Title/suffix	(5)	
	Social security no.	(11)	
	Occupation	(25)	
	Date of birth (m/d/y)	(8)	
	Date of death (m/d/y)	(8)	
	Dependency status (table)	(1)	
	1=blind	(1)	

Address	1=use foreign format	(1)	
	In care of	(40)	
	Street address	(40)	
	Apartment number	(10)	
	City	(22)	
	State	(2)	
	ZIP code	(10)	

Foreign Address	Region	(20)	
	Postal code	(15)	
	Country	(20)	

Taxpayer Contact Information	Home phone	(14)	
	Work phone	(14)	
	Work extension	(5)	
	Daytime phone (table)	(1)	
	Mobile phone	(14)	
	Fax number	(14)	
	E-mail address	(40)	

Spouse Contact Information	Home phone	(14)	
	Work phone	(14)	
	Work extension	(5)	
	Daytime phone (table)	(1)	
	Mobile phone	(14)	
	Fax number	(14)	
	E-mail address	(40)	

Filing Status

1 = Single
2 = Married filing joint
3 = Married filing separate
4 = Head of household
5 = Qualifying surviving spouse

Daytime Phone

1 = Work
2 = Home
3 = Mobile

Dependent Status

1 = Not applicable
2 = Could be a dependent
3 = Claimed as a dependent

	Hash Total		1

2023	1040	US	Client Information (continued)	1 p2

Taxpayer Authentication	TP ID verification (see table) (40)	
	ID type (see table) (40)	
	Driver's license no. (40)	
	Driver's license state (2)	
	Issue date (m/d/y) (8)	
	Expiration date (m/d/y) (8)	
	Additional information (40)	
	Theft protection PIN (6)	
	1=had IRS theft protection PIN in prior year (1)	
Spouse Authentication	ID type (see table) (40)	
	Driver's license no. (40)	
	Driver's license state (2)	
	Issue date (m/d/y) (8)	
	Expiration date (m/d/y) (8)	
	Additional information (40)	
	Theft protection PIN (6)	
	1=had IRS theft protection PIN in prior year (1)	
Miscellaneous	1=Address verified? (1)	
	1=DL/State ID #(s) verified? (1)	
	Salutation [O] (40)	
	1=SSN's verified (1)	
	Custom filter (20)	
	Firm number (2)	
	Preparer number (2)	
	Designee no., if different (2)	
	Staff preparer number (2)	
	Prepared by (see table) (1)	
	Database report state (2)	
	Primary contact (40)	
	Promise Date (m/d/y) (8)	

Prepared By

1 = Firm
2 = Non-paid preparer
3 = Self-prepared

Taxpayer ID Verification

1 = Identity not verified
2 = In person - valid govt. picture ID
3 = Remote - valid govt. picture ID or financial/ utility account number
4 = Remote - valid govt. picture ID a nd financial / utility account number

ID Type

1 = Did not provide driver's license or state ID
2 = Does not have driver's license or state ID
3 = Driver's license
4 = State ID

	Hash Total		1 p2