

Client Information for _____

Tax Year(s)

DATE DROPPED OFF

TIME DROPPED OFF

Name: _____

Current Address: _____

E-Mail: _____

Preferred

Day Phone: _____

E-file return? YES / NO (* If no see below)

Evening Phone: _____

Direct Deposit refunds? YES / NO

Cell Phone: _____

Return Format: (Circle One)

Paper* Email Thumbdrive (you must provide)

Are you a NEW or RETURNING client?

NEW CLIENTS: WE NEED A COPY OF YOUR 2010 TAX RETURN!!

If you are a new client, how did you hear about us? _____

Do You have Bookkeeping that needs to be done??

Do you have a FAFSA deadline to meet?

YES / NO

What date? _____

Family Member Information

Mos. lived w/you during the year

Name

Date Of Birth

SSN / TIN

Taxpayer

Spouse (even if filing separate)

Dependent 1

Dependent 2

Dependent 3

(Additional Dependents may be listed on the back.)

We only need the birth dates and SSN's on family members that have not been claimed before.

If you had a baby or adopted last year -- we need legal name, social security number and date of birth

If you are not claiming any of your children -- please list below.

Did you claim the First Time Homebuyer Credit of 2008? If yes, we will need a copy of your 2008 tax return. _____

Did you get married/ divorced in 2011? _____

If you think you will qualify for Earned Income Credit, we need copies of your family's social security cards.

*Due to a new IRS mandate, E-filing is required this year. If you refuse, there will be a release waiver to sign and a \$35 fee.

Payment of tax return at pick up is required.

ANY THING YOU THINK WE NEED TO KNOW/ ANY QUESTIONS YOU HAVE: _____

NOTICE: IF YOU DO NOT FILL OUT THE SHEET ENTIRLEY YOU WILL BE CHARGED A \$35 FEE
IF WE HAVE TO MAKE CHANGES TO THE RETURN!
THANKS FOR YOUR CORPORATION!
(MORE QUESTIONS ON BACK)

Please answer the following questions.**If yes,...**

Can you or your spouse be claimed as a dependent on anyone else's return?	YES / NO	Which one of you?
Is this a different address or name?	YES / NO	
Did you change jobs or look for a new job?	YES / NO	
Are you or your spouse legally blind?	YES / NO	Which one of you?
Have you added any new dependents?	YES / NO	We need a copy of his/her social security card.
Did you receive alimony?	YES / NO	
Did you make any estimated payments?	YES / NO	We need dates and amounts of payments.
Did you have any interest income?	YES / NO	We need copies of your forms 1099-INT.
Did you have any dividend income?	YES / NO	We need copies of your forms 1099-DIV.
Have you cashed-in or rolled-over any IRAs or other retirement plans?	YES / NO	We need a form 1099-R from each account affected.
Did any of your real estate get foreclosed-on or did you have any cancellations of debt?	YES / NO	We need any forms 1099-A or 1099-C you received.
Did you sell any stocks?	YES / NO	We need your form 1099-S and the cost basis (purchase price) of the stocks sold.
Did you buy or sell any real estate?	YES / NO	We may need copies of your settlement statement(s) from both the purchase and sale of the property.
Do you own any rental properties?	YES / NO	We need your related income and expenses.
Were you self-employed?	YES / NO	We need your income and expenses, including mileage.
Did you pay for health insurance?	YES / NO	We need the total amount paid.
Did you receive a state refund and itemize last year?	YES / NO	
Did you receive unemployment?	YES / NO	
Did you receive Social Security?	YES / NO	
Did you receive lottery or gambling winnings or other prizes?	YES / NO	If YES, what are your losses? \$
Did you support a parent at their home or nursing home?	YES / NO	
Did you receive any estate or trust income?	YES / NO	
Did you take any college courses?	YES / NO	We need your tuition, book fees or form 1098T.
Are you paying any student loans?	YES / NO	

Schedule A: Itemized Deductions

Did you have long-term care or health insurance?	YES / NO	We need the total amounts paid for each.
What were your total medical and dental expenses (co-pays and out-of-pocket)?		
Do you own a home?	YES / NO	We need a copy of your form 1098 and your real estate tax paid.
Did you pay any personal property tax?	YES / NO	We need the amount paid.
Did you give any charitable donations? (You will need to keep receipts for all donations.)	YES / NO	We need the total amount given minus any value of benefits received (i.e. dinner, concert tickets, etc.).
Did you make any contributions to a MOST?	YES / NO	We need the total amount paid.
Did you pay any state or local real estate tax?	YES / NO	We need the receipt or the total amount paid.
Did you put money into a HAS?	YES / NO	
Do you have any unreimbursed work items as a W-2 employee?	YES / NO	