

Client Information for _____

Tax Year(s)

DATE DROPPED OFF

Name: _____

Current Address: _____

E-Mail: _____

Preferred

Day Phone: _____

E-file return? YES / NO

Evening Phone: _____

Direct Deposit refunds? YES / NO

Cell Phone: _____

Return Format: (Circle One)

Paper CD Email

Are you a NEW or RETURNING client?

New clients: We will need a copy of your prior year return.

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

Do you have a FAFSA deadline to meet?

YES / NO

What date? _____

Family Member Information

Mo.s 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 get married/ divorced in 2008? _____

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

NOTICE IF YOU DO NOT FILL OUT THE SHEET ENTIRELY YOU MAY BE CHARGED A \$30 FEE
IF WE HAVE TO MAKE CHANGES TO THE RETURN!
THANKS FOR YOUR COOPERATION!

(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?

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 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.

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.