



Please print and complete all questions to the best of your knowledge. You will be contacted if additional information is needed.

Client Name: _____ Social Security #: _____ - -
Spouse Name: _____ Social Security #: _____ - -
Client Date of Birth: _____ Client Email: _____
Spouse Date of Birth: _____ Spouse Email: _____
Home Phone #: _____ Best time to call: _____
Work Phone #: _____ Best time to call: _____
County: _____ Client Occupation: _____
School District: _____ Spouse Occupation: _____

Address 1 (street): _____ Did you move last year? (circle one) Y or N
Address 2: _____ If yes, date moved: _____
City/State/ZIP: _____ Prior Address: _____

Dependents (or persons living in your household)

Table with 4 columns: Name, Date of Birth, Relationship, # Months in your home. Rows 1-5.

W-2s enclosed Y or N If no, explain _____ Number of W-2's _____
Forms 1098 Y or N form for Mortgage Interest, Education and Tuition expenses
Forms 1099 Y or N form for bank interest, dividends, retirement income, misc.
Form SSA1099 Y or N form for Social Security Benefits
Prior year return Y or N are you providing a copy of last year's tax return (optional)

1 Do you own rental property? Y or N If yes, provide profit & loss statement
2 Do you own your own business? Y or N If yes, provide profit & loss statement
3 Did you buy or sell a home? Y or N
4 Child care expenses? Y or N If yes, need provider name/address/tax ID/amount paid
5 Did you have education expenses? Y or N For schooling beyond high school
6 Pay any medical expenses? Y or N
7 Pay any student loan interest? Y or N
8 Did you make any contributions? Y or N If, yes please provide amounts: _____
9 Any IRA contributions? Y or N If, yes: Client _____, Spouse _____
10 Estimated tax payments? Y or N Federal _____, State _____, Other _____
11 Pay or receive alimony? Y or N
12 Moving expenses to deduct? Y or N
13 Any unreimbursed employee expenses? Y or N Union dues, work clothes, meals, vehicle expenses, etc
14 Have any casualty losses? Y or N Property damage from fire, storm, accident, theft
15 Did you sell stocks, bonds, etc.? Y or N You should have received Form 1099-B
16 Prior year state/city tax refunds? Y or N State _____, School _____, City _____
17 Direct deposit if refund? Y or N
18 Are you married and live with spouse? Y or N If separated, have you live apart more than 6 months? Y or N

Please provide any other information on the back of this form you feel is necessary in preparing your return.