



Tax Filing Basic Info

DATE: _____
DEPOSIT AMOUNT: _____

Tax year: _____

Please fill out this form and gather all your needed documents before you come to our tax office to save time. This is a guideline which does not include all documents. We do not share your information with anyone without your approval.

Basic Info			
Taxpayer Name:		Spouse Name:	
Occupation:		Occupation:	
Birth Date:		Birth Date:	
Address:		City:	State: Zip:
Contact Phone:		Email:	
Filing status: Single___ Married Filing Jointly___ Married Filing Separately___ Head of Household___ Qualifying Widower___			
Proof of dependents living with you: School records___ Medical records___ Child Care records___ Other_____			
Dependent Name (first, initial and last name)	Birth Date mm/dd/yyyy	Relationship	Months lived in your home this tax year
Answer All That Apply			
<input type="checkbox"/> Are you a sole-proprietor or self-employed or a contractor, if checked please fill out our Annual Income - Expenses Form.			
<input type="checkbox"/> Did you pay estimated Federal or State taxes last year? For MFS, did your spouse itemize? Yes___ No___			
<input type="checkbox"/> Did you trade any financial interest in any virtual currency ? OR Stocks?			
<input type="checkbox"/> Did you have Income and Expenses of Rental Property? Did you sell any Real Estate? Yes___ No___			
<input type="checkbox"/> Chk <input type="checkbox"/> Sv Routing # _____ Account # _____ for direct deposit / direct debit			
Documents Received	You	Spouse	Dependents
All Form W-2 and any Income Statement (jury duty, hobby, alimony, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Form 1099s - Unemployment Compensation (1099-G), Miscellaneous Income (1099-MISC), Retirement Plan Distribution (1099-R), Interest Income (1099-INT), Dividend Income (1099-DIV), Cancellation of Debt (1099-C), ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Form 1099-B - Stocks transactions - Gain / Loss	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Form 1098-T - Tuition Statement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Form 1098-E - Student Loan Interest Statement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Form 1099-SSA - Social Security Benefit Statement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FOR HOMEOWNERS - Form 1098 - Mortgage Interest Statement Receipt showing real estate taxes paid	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Form W-2G - Certain Gambling Winnings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expenses records	You	Spouse	Dependents
Child and Dependents Care Receipts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tuition & Book Receipts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Medical Receipts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Records of Charitable donations or expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Records of any IRA or other Retirement contributions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Casualty Losses / Theft Losses (Federally declared disaster area only)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FOR HOMEOWNERS - Receipts for energy saving improvements on your home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health Insurance Marketplace	You	Spouse	Dependents
Form 1095-A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please have the following documents with you: Driver license or photo ID of you & spouse, SSN or ITIN for everyone on the tax return, dependent's proof of residency (school/doctor records...) and last year's tax return if you have it.