**CLIENT TAX INFORMATION SHEET**

**First Class Income Tax**  **5145 Preston Ave Suite 190**  **Pasadena, TX 77505**

**LINDAFLOYD@FIRSTCLASSINCOMTAX**

Tax Year: Date: \_

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Taxpayer Name:** | |  | |  | **Spouse's Name:** | |  | | |
| **Soc. Sec. Number: Date of Birth: Occupation: Email Address: Home Phone: Work Phone:**  **Cell Phone:** | |  | | **Soc. Sec. Number: Date of Birth: Occupation: Email Address: Home Phone: Work Phone:**  **Cell Phone:** | |  | | |
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| **Address:** |  | | | | | | | | |
| **City:** |  | | **State:** | | |  | | **Zip:** |  |

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| --- | --- | --- | --- | --- |
| **Fill out only if info has changed. Filing Status** | | | | |
| Single | Married Filing Jointly | Married Filing Separately | Head of Household | Qualifying Widow/er |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Dependent Name**  **(First, Middle Initial, Last)** | **Date of**  **Birth** | **Dependent's**  **Soc. Sec. Number** | **Relationship** | **Child Care** | **College Tuition** |
|  |  |  |  | Y N | Y N |
|  |  |  |  | Y N | Y N |
|  |  |  |  | Y N | Y N |
|  |  |  |  | Y N | Y N |

|  |  |  |  |
| --- | --- | --- | --- |
| **If you are due a refund, would you like direct deposit?** | | | Y  N |
|  Check Box if Direct Deposit Information is the same as last year. | | | |
| Bank: | Routing #: | Account #: | |

|  |  |  |
| --- | --- | --- |
| **Documentation Included** | | |
| Salary/Wages (W2) | Rental Property Income | Real Estate Taxes Paid |
| Independent Contractor (1099-MISC) | Interest (1099-INT) | Mortgage Statement (1098) |
| Unemployment (1099-G) | Dividends (1099-DIV) | Lottery/Gambling Winnings |
| IRA Distributions (1099-R) | HSA (1099-SA) | Student Loan Interest (1098-E) |
| Stocks/Bonds (1099-B) | Social Security Benefits (SS-1099) | Education Expenses (1098-T) |