**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 #: |

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| **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) |