

OFFICE USE ONLY

Tax Interview

INCOME & TAX INFORMATION	T	S	DEDUCTIONS / ADJUSTMENTS	T	S
W 2'S (WAGES FROM EMPLOYER)			MEDICAL EXPENSE & MILEAGE		
W 2'S (GAMBLING / LOTTERY WINNINGS)			REAL ESTATE / PERSONAL PROPERTY TAXES		
1099 INT (INTEREST / BANK STATEMENTS)			MORTGAGE INTEREST PAID		
1099 - DIV (DIVIDENDS)			CHARITABLE CONTRIBUTIONS		
1099 -B (STOCK SALES / BROKER STATEMENTS)			EMPLOYEE BUSINESS EXPENSES		
1099 - G (UNEMPLOYMENT / STATE REFUNDS)			GAMBLING LOSES		
1099 - MISC (MISC INCOME)			MOVING EXPENSE		
1099-R (RETIREMENT INCOME)			TRADITIONAL IRA CONTRIBUTIONS		
1099 - SSA (SOCIAL SECURTIY)			HIGHER EDUCATIONS EXPENSES (1098-T)		
1099 - RRB (RAILROAD RETIREMENT)			EDUCATOR EXPENSES		
1099 - K (PARTNERSHIP / MERCHANT PAY)			STUDENTLOAN INTEREST PAID		
SELF EMPLOYMENT INCOME			UNREIMBURSED JOB EXPENSES		
SALE OF BUSINESS ASSESTS			UNION DUES PAID		
SALE OF PERSONAL RESIDENCE					
RENTAL INCOME & EXPENSES			TAX CREDITS		
ESTIMATED TAXES PAID			UNION DUES PAID		
OTHER:			RETIREMENT SAVINGS CONTRIBUTIONS		
OTHER:			TUITION RECEIPTS & EXPENSES		
OTHER:			HEALTH CARE SAVINGS ACCOUNT		
OTHER:			OTHER:		
OTHER:			OTHER:		

Does client owe any delinquent:

Child Support? Yes No Back Taxes? Yes No Student Loans? Yes No Other Government Debt? Yes No

I hereby give consent for my tax professional to call to obtain information of any FMS debt, I further hereby agree that the above information is true to the best of my knowledge.

Client Signature: _____

Could tax refund be offset? Yes No _____

Date: _____

Tax Preparer Initial: _____ Standard Deduction Itemizing