

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)

	Name:	Date of Birth	Relationship	# Months in your home
1				
2				
3				
4				
5				

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

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

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