

Personal Information

	Full Name (As shown on social security card)	Date of Birth	Social Security Number	Occupation	Disabled/Blind/Passed away (Please indicate)	Can be claimed as a dependent by someone else? (Yes/No)
Taxpayer						
Spouse						

Identification

	ID Type (DL/ID)	State	Number	Issue Date	Expiration Date	Do Not Have	Can Not Provide
Taxpayer							
Spouse							

Mailing Address: _____, _____
(state) (Zip)

Email: _____ Cell/Home Phone: (____) _____

Dependent Information

Full Name (As shown on social security card)	Date of Birth	Social Security Number	Relationship	Number of Months Lived with You	Number of Months a Full Time Student	Percent of Support provided by you

Life Changing Events & Other Misc Questions

<u><i>Questions (Did you /Have you/Etc.)</i></u>	<u><i>Yes</i></u>	<u><i>No</i></u>	<u><i>If you answered yes, please explain</i></u>
<i>New Employer</i>			
<i>Moved</i>			
<i>Freelance/Contract Work</i>			
<i>New Dependent/Child</i>			
<i>Dependent Income</i>			
<i>Marital Changes/Married/Divorced/Widowed</i>			
<i>Have Health Insurance for ALL/ALL year</i>			
<i>Health Insurance Provided Through Marketplace</i>			
<i>College Tuition/Expenses</i>			
<i>Start a Business</i>			
<i>Bought/Sold/Refinanced a Home</i>			
<i>Retirement Plan Withdraw/Income</i>			
<i>Received Unemployment/Paid Family leave/Disability/Social Security</i>			
<i>Received an Identity Protection PIN (6-digit #) from The IRS</i>			
<i>A Resident of Another State</i>			
<i>Earn Money in Another State (wages, rental income, misc income)</i>			
<i>Member of US Armed Forces</i>			
<i>Bank Accounts</i>			
<i>Foreign Accounts</i>			
<i>Vehicle Registration Fees</i>			

2018 Income Tax Data

The information requested on this form is for the preparation for your income return and relates to you and your dependents personally. This information will not be shared with anyone besides the taxpayer (s) and Teresa Roa who will be preparing your taxes unless there is a written agreement stating otherwise. This form must be printed and completed by hand once completed; You can either mail this signed and dated form in with your supporting documentation to P.O. Box 709, Little Rock, CA, 93543 or you can scan this signed and dated form and all supporting documentation through a secured email to info@allyourfinancialrequests.com. All documentation that is received in the mail will be retained for a minimum of 3 years according to the IRS limitations on record retention. We can not prepare your taxes without this signed and dated form . This form can also be found on our website allyourfinancialrequests.com (2018 Data Form).

Declaration:

I have reviewed the information provided to you on this form and to the best of my knowledge this information is true, correct and complete. I have maintained the underlying records required by law to support this information. I authorize Teresa Roa to prepare my income tax return based on this information and to retain copies of any appropriate documentation.

Taxpayer Signature: _____ *Date:* / / .

Spouse's Signature: _____ *Date:* / / .

Documentations To Send In With This Form

(These are only examples of common tax forms & proper documentation needed)

Wages & Income;

- ***Wages/Salaries (W-2)***
- ***Small business/Contract Labor (1099-G)***
- ***Retirement, 401(k), Pension Withdrawals (1099-R)***
- ***Health/Medical Savings Account (1099-SA)***
- ***Rental Properties/Royalties (Sch.E)***
- ***Bank Account Interest (1099-INT)***
- ***Refunds (1099-G)***
- ***Unemployment/PFL/Disability/Social Security (1099-G)***

Deductions:

- ***Work Related Expenses (Employee business expense, home office receipts)***
- ***Medical & Dental Related Expenses (Receipts for all medical expenses and mileage logs)***
- ***Health Savings Account (Plan contribution)***
- ***Retirement Savings Contribution (1099-SA)***
- ***Student Loan Interest (1098-E)***
- ***Mortgage/Real Estate Interest (1098)***
- ***Charitable Contributions (receipts/statements)***
- ***Personal Property Tax***
- ***Other Sales Tax***
- ***Other Interest Tax***
- ***Union/Club/Moving Expense***

Credits: (These are common credits that may or may not apply to you, most are automatically credited based on “family” size, income, & tax situations.)

- *Adoption Credit*
- *Child Tax Credit*
- *Earned Income Credit*
- *Child & Dependent Care Credit*
- *Elderly & Disabled Credit*
- *Energy Efficient Tax Credit*
- *Affordable Care Act*
- *Health Coverage Tax Credit*
- *Lifetime Learning Credit*
- *American Opportunity Tax Credit*

In addition to any of the above forms and/or documentation including information from the above questionnaire;

you will be providing me I will need a copy of last years taxes (if this is your first year I am preparing your taxes)

Or

last year's Adjusted Gross Income (AGI). AGI can be found on line 37 of your 1040; line 21 on your 1040-A or Line 4 of your 1040-EZ.

Once completed I will send your taxes via mail or email as per your request on the next page.

If a refund is due to you the IRS normally issues a refund within 21 days, and the State of CA normally issues refunds within 2 weeks. You can always check your refund(s)

IRS - <https://sa.www4.irs.gov/irfof/lang/en/irfofgetstatus.jsp>

CA - <https://webapp.ftb.ca.gov/refund/login.aspx?lang=en-US>

Below is the expected return dates

If the IRS receives your return on this date...	Then your refund should be direct deposited by this date.	Then your refund check should be mailed by this date.
January 28	February 11	February 15
February 4	February 18	February 22
February 11	February 25	March 1
February 19	March 6	March 13
February 25	March 13	March 20
March 4	March 18	March 22
March 11	March 25	March 29
March 18	April 1	April 5
March 25	April 8	April 12
April 1	April 15	April 19
April 8	April 22	April 26
April 15	April 29	May 8

How would you like to receive your 2018 tax returns?

- Emailed
- Mailed
- Faxed

If a Federal refund is due, how would you like to receive it?

- Paper Check
- Direct Deposit

Routing Number: _____.

Account Number: _____.

- Checkings Account
- Savings Account

If a State refund is due, how would you like to receive it?

- Paper Check
- Direct Deposit

Routing Number: _____.

Account Number: _____.

- Checkings Account
- Savings Account

Taxpayer Signature: _____ *Date:* / / .

Spouse's Signature: _____ *Date:* / / .