



Carl D. Long, EA

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www.cdltaxes.com

CLIENT INFORMATION QUESTIONNAIRE

APPLICANT INFORMATION		
Name:		
Date of Birth:	SSN:	Phone:
Current Address:		
City:	State:	ZIP Code:
Email:	Monthly Mortgage/Rent:	How long?
<i>If Rent, please provide information below:</i>		
Landlord Name:	Landlord Address:	
City:	State:	ZIP Code:
SPOUSE INFORMATION IF JOINT FILING		
Name:		
Date of Birth:	SSN:	
DEPENDENTS (IF APPLICABLE)		
Name and Relationship	SSN	Date of Birth
E-FILING – BANKING INFORMATION NEEDED		
Name of Financial Institution:		
Routing #:	Bank Account #:	
SIGNATURES		
I hereby certify that all the information in this return is true and correct to the best of my knowledge. I also certify that I do not owe any tax due and/or any tax liens from prior tax years, nor have I previously filed a current year income tax return.		
Signature of Applicant:		Date:
Signature of Spouse (<i>only if filing a joint return</i>):		Date:

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Tax Filing Document Checklist:

- W-2's and W-2G (Gambling Income)
- 1098- Mortgage interest and Property taxes
- 1099-G (State Refund or Unemployment Income)
- 1099-INT (Interest Income)
- 1099-DIV (Dividend Income)
- 1099-B (Sale of Stock Income/Loss)
- 1099-NEC/MISC (Self Employment Income, Part-time Work ie:Uber,Instacart,etc)
- 1099-R (Retirement Income, 401k, IRA, Annuity, Early Withdrawals)
- 1099-SA (Health Savings Account Distributions)
- 1099-SSA (Social Security Income)
- 1098-E (Student Loan Interest)
- 1098-T (Student Tuition Paid)
- Rental Properties (Rental Income and Expenses-Mortgage interest,Property Taxes,Insurance,Repairs/Maintenance,Original purchase price and Date in Service)
- Business Income/Expense (Schedule C) - All income (Cash,1099,Venmo,Cashapp, etc) and business related expenses by category(Rent,Advertising,Supplies,etc)
- Copy of Prior Year Return Yes No
- Donation Statements (Church, Non-Profit Organizations, Non-Cash Donations)
- Energy efficient purchases (HVAC,Windows,Insulation,Roof,Doors,Electric vehicle)
- Driver's License Information - License #, Date issued and Date of expiration
- Rent Information (Landlord Name and Address, Amount Paid)

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