

	Taxpayer	Spouse
First name (required entry)		
Last name (required entry)		

**PROVIDE DATA BELOW IF YOU ARE A NEW CLIENT OR IF INFORMATION HAS CHANGED FROM LAST YEAR.**

Filing Status (see below)

1 = single, 2 = married filing jointly, 3 = married filing separate, 4 = head of household,

	Taxpayer	Spouse
Social security number		
Occupation		
Date of birth (m/d/y)		
Street address		
Apartment number		
City		
State		
Zip Code		

	Taxpayer	Spouse
Home phone		
Work phone		
Mobile Phone		
DL No /State		
Email ID		

First name		
Last name		
Date of birth (m/d/y)		
Social security number		
Relationship		
Mo's lived at home, if not 12		

Bank information is for Refund direct Deposit or for electronic payment of taxes due

Bank Routing Number

Bank Account Number

**READ THIS NOTE BEFORE PROCEEDING!**  
**PROVIDE THE FORMS LISTED BELOW FOR REVIEW.**  
**THEY WILL BE RETURNED TO YOU UPON COMPLETION OF THE TAX RETURN.**

Form Name/Number	Form Description
W2	Wages
W2-C	Corrected Wages
W2-G	Gambling Winnings
Form 1098	Mortgage Interest
Form 1098-C	Gross proceeds Auto Donation
Form 1098-E	Student Loan Interest
Form 1099-B	Proceeds from Broker Transactions (stocks, bonds, mutual funds)
Form 1099-INT	Interest Earned
Form 1099-DIV	Dividends Earned
Form 1099-A	Acquisition or Abandonment of Secured Property
Form 1099-C	Cancellation of Debt
Form 1099-G	Unemployment
	State Tax refunds
Form 1099-MISC	Rents - box 1
	Royalties - box 2
	Other Income - box 3
	Non-Employee Compensation - box 7
	Medical and Health Care payments - box 8
Form 1099-OID	Original Issue Discount
Form 1099-Q	Education distributions
Form 1099-R	Retirement Plan Distributions
Form 1099-S	Real Estate transactions
Form 5498-SA	Health Savings Account contributions
Form SSA-1099	Social Security benefits
Form 1099-SA	Health Savings Account distributions
Schedule K-1	Partnerships & LLC's
	Estates & Trusts
	S Corporations
All other tax related forms	
>>>>	<b>Tax Related Documents</b>

**Provide the following documents for review. All original documents will be returned to you.**

Document	Description/Comments
Previous year tax return	Provide copy if not prepared by our office
Closing settlement statements	Provide copies for purchase/sale/exchange/refinance of real property
Realized Gains & Losses	Provide statement(s) from financial institutions for assetsales
Average Cost Basis	Provide statement(s) from financial institutions for assetsales
Auto Acquisition	Provide copy of purchase or lease agreement if auto has business use
Noncash donations	If the aggregate total for non-cash contributions are <b>in excess of \$500</b> for the year, provide receipts for all donations made. Make sure the fair market value is listed on the receipt.
All other tax related documents	