

# TAX & ACCOUNTING ADVISORS

## TAXPAYER INFORMATION

In order for us to accurately file your Federal and State tax return we need the following information. The information that you provide to us will remain confidential. We value your privacy and we promise not to violate that trust.

PLEASE PRINT ALL INFORMATION.

Primary Taxpayer Full name: \_\_\_\_\_

SSN: \_\_\_\_\_ DOB: \_\_\_\_\_

Filing Status: \_\_\_\_\_ Occupation: \_\_\_\_\_

Spouse Full Name: \_\_\_\_\_

Spouse SSN : \_\_\_\_\_ Spouse DOB: \_\_\_\_\_

Address: \_\_\_\_\_ Apt: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

Citizenship Status (check one):  US Citizen  US Permanent Resident  Other: \_\_\_\_\_

Dependent Information:

	Name	SSN	DOB	Relationship
1				
2				
3				
4				

**The above information is true to the best of my knowledge.**

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

WHAT TO BRING TO YOUR TAX INTERVIEW (check all that apply):

- Wage statements/W-2
- Pension, retirement income/1099-R
- IRA contributions & distributions/1099-R
- Interest & dividend income/1099-INT/1099-DIV
- Commissions
- Sales of stocks or bonds/1099-B
- Self-employed bus. income & expenses/1099-MISC
- Lottery or gambling winnings & losses/W-2G
- State refund amount/1099-G
- Social Security & Unemployment income/ SSA-1099/1099-G
- Income and expenses from rentals
- Income from partnerships, S corporations, trusts & estates/Schedule K-1
- Alimony paid or received
- Record of purchase or sale of residence
- Medical and dental expenses
- Real estate and personal property taxes
- Estimate taxes, taxes, state, local, & foreign taxes paid
- Cash and non-cash charitable donations
- Mortgage or home equity loan interest paid/1098
- Un-reimbursed employment-related expenses
- Casualty & theft losses
- Educational expenses/1098-E/1098-T/1099-Q
- Child care expenses & provider information
- Economic Stimulus Payment/Rebate IRS notices
- Social Security Card(s)
- Driver's License(s)
- Dependent's SSN & DOB
- Last year's tax

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