



### TAX CLIENT

TAXPAYERS NAME		DATE OF BIRTH	SPOUSE NAME		DATE OF BIRTH
SSN	OCCUPATION		SSN	OCCUPATION	
HEALTH INS PROVIDE? <b>ATTACH 1095</b>		COVERED ALL YEAR?	HEALTH INS PROVIDE? <b>ATTACH 1095</b>		COVERED ALL YEAR?
EMAIL		PAPER/EMAIL COPY?	EMAIL		PAPER/EMAIL COPY?
HOME OR CELL PHONE		WORK PHONE	HOME OR CELL PHONE		WORK PHONE

DEPENDENTS NAME	DATE OF BIRTH	SSN	RELATIONSHIP & MONTHS LIVED WITH	HEALTH INS?
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CURRENT ADDRESS				APT
CITY	STATE	ZIP	COUNTY	

#### PLEASE FILL OUT FOR REFUND DIRECT DEPOSIT TO YOUR BANK ACCOUNT

ROUTING NUMBER	ACCOUNT NUMBER	CHECK OR SAVING	BANK NAME
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#### ESTIMATED TAXES PAID FOR TAX YEAR 2014 - AMOUNT AND DATE PAID

FIRST QUARTER DUE 4/15	SECOND QUARTER 6/15	THIRD QUARTER DUE 9/15	FOURTH QUARTER DUE 1/15
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#### INCOME - CHECK OR CIRCLE AND ATTACH STATEMENTS FOR ALL INCOME THAT APPLY

<input type="checkbox"/> W2 WAGES	<input type="checkbox"/> UNEMPLOYMENT	<input type="checkbox"/> ALIMONY	<input type="checkbox"/> SELF EMPLOYED	<input type="checkbox"/> CANCELLATION OF DEBT
<input type="checkbox"/> 1099'S	<input type="checkbox"/> PENSION INCOME	<input type="checkbox"/> SOCIAL SECURITY	<input type="checkbox"/> SOLE OWNER BUSINESS	<input type="checkbox"/> LOTTERY WINNINGS
<input type="checkbox"/> INTEREST	<input type="checkbox"/> DIVIDENDS	<input type="checkbox"/> RETIREMENT INCOME	<input type="checkbox"/> RENTAL OR ROYALTY	<input type="checkbox"/> STOCK SALES

#### DEDUCTIONS AND CREDITS - CHECK OR CIRCLE AND ATTACH STATEMENTS FOR ALL THAT APPLY

<input type="checkbox"/> STUDENT LOAN INTEREST	<input type="checkbox"/> DAYCARE EXPENSES	<input type="checkbox"/> MORTGAGE INTEREST	<input type="checkbox"/> CHARITY CONTRIBUTIONS
<input type="checkbox"/> FOREIGN TAX PAID	<input type="checkbox"/> ADOPTION EXPENSES	<input type="checkbox"/> PROPERTY TAX	<input type="checkbox"/> MEDICAL & DENTAL EXPENSES
<input type="checkbox"/> HOME ENERGY UPGRADES	<input type="checkbox"/> EDUCATION TUITION	<input type="checkbox"/> CASUALTY OR THEFT LOSS	<input type="checkbox"/> JOB RELATED EXPENSES

#### CHANGES - PLEASE PUT DATE

SEPARATED/DIVORCED / MARRIED / MOVED / BUY OR SELL A HOME /  
OTHER CHANGES

#### PLEASE CHECK OR CIRCLE YES OR NO

DID YOU MAKE ANY RETIREMENT CONTRIBUTIONS (DO NOT INCLUDE EMPLOYER DEDUCTIONS)?  YES (PLEASE ATTACH) OR  NO  
 YOU HAVE UNTIL 4/15 TO MAKE CONTRIBUTIONS, ARE YOU INTERESTED IN SAVING TAXES BY CONTRIBUTING MORE?  YES OR  NO  
 DID YOU RECEIVE THE FIRST TIME HOME BUYER CREDIT OF \$7500 IN 2008?  YES OR  NO  
 DID YOU MAKE ANY GIFT OF CASH OR PROPERTY OVER \$14,000?  YES OR  NO  
 DID YOU HAVE ANY FOREIGN BANK ACCOUNTS OR EARN ANY FOREIGN INCOME?  YES OR  NO

#### I HAVE PROVIDE ALL INFORMATION CORRECTLY ABOVE

TAXPAYER SIGNATURE	SPOUSE SIGNATURE
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**IF WE DID NOT PREPARE YOUR PRIOR YEAR TAX RETURN PLEASE PROVIDE A COPY OR EMAIL**

TEL 843-284-NKNK (6565) Hello@NumberKeepers.com

www.NumberKeepers.com