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Most Important & Commonly Forgotten Items

Existing & New Clients:

- I. W2s, 1099's
- II. Mortgage Interest Paid (all 1098 forms)
- III. Property Tax Paid
- IV. SS#'s for newborns/birth certificates
- V. Day Care Information/including Tax ID#
- VI. DMV (car registration) for all cars, boats, trucks, motorcycles, jet skies, etc.
- VII. Student Loan Interest Paid
- VIII. Tuition/Books/School Supply Expenses paid
- IX. Final Closing/Settlement Statement for New Purchase or Refinance. If you are not sure what this is please contact your escrow company and they can assist you to fax or email it to you.
- X. Deduction Sheets that apply to you (Business owner deductions/Rental property deductions)
- XI. Checking Account # and Routing # for Direct Deposit of your refund (if you have changed it please let us know)
- XII. If you have moved please provide new address or verify previous information.

New Clients Only:

- All of the Items above
- Your previous year's tax return (to compare)
- Any & All SS#'s and birthdates for any spouses or dependents (Copies of socials and birth certificates)

Please respond to the following questions with the best of your knowledge, So we can prepare your Tax Return with accuracy
Write your name exactly as is on your Social Security Card.

Name: _____ DOB: _____ SS# _____

Home/Phone _____ Work/Phone _____

Spouse Name: _____ DOB: _____ SS# _____

Your Occupation: _____ Spouse Occupation _____

Mailing Address: _____

DEPENDENTS:

Complete Name	DOB	SS#	RELATIONSHIP	#MONTHS LIVED WITH YOU
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

BABY SITTER INFORMATION:

Name _____ SS # _____ Total paid during the year \$ _____

Home # _____ Address: _____

OTHER INCOME

Did you receive Unemployment Compesation last year? If yes, how much? _____

Did you receive Disability Income last year? If yes, how much? _____

How much interest did you or your spouse received from checking or saving account last year? _____

Other Income _____

HOME OWNERS

Total medical expenses _____ Real State Taxes _____ Personal (DMV) Taxes _____

Mortgage Interest* _____ Other Mortgage interest paid: _____ Other Expenses _____

Union Dues _____ Tax Preparation _____ Contributions: _____

SELF EMPLOYED

Business name _____ Business Address _____

Business Type _____ EIN _____ Sales _____ Returns _____

Advertising _____ Bads Debts from sales or service _____ Car & truck expenses _____

Commissions and fees _____ Depletion _____ Depreciacion _____

Employee Benefit _____ Insurance _____ Interest _____ Mortgage _____

Legal & professional services _____ Rent or lease _____ Repairs & maintenance _____

Supplies _____ Taxes & licenses _____ Travel _____ Meals _____ Utilities _____

Wages _____ Other Expenses _____

If you have any additional houses or rental properties, pleas let us know. Your tax will be prepared based up on the information that you have provided. We are not responsible for any missing acemacy, accuracy or uncomplete inf. That you provided to this office.

TAX PAYER SIGNATURE _____ **DATE:** _____