

<p><b>Taxpayer Information</b></p> <p>Last name _____</p> <p>First name _____</p> <p>Middle Initial _____ Suffix _____</p> <p>Social security number _____</p> <p>Occupation _____</p> <p>Work phone _____ Ext _____</p> <p>Cell phone _____</p> <p>E-mail address _____</p> <p>Date of birth _____</p>	<p><b>Spouse Information</b></p> <p>Last name _____</p> <p>First name _____</p> <p>Middle Initial _____ Suffix _____</p> <p>Social security number _____</p> <p>Occupation _____</p> <p>Work phone _____ Ext _____</p> <p>Cell phone _____</p> <p>E-mail address _____</p> <p>Date of birth _____</p>
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**Please provide a copy of driver's license**

**Dependent Information**

First Name	Last Name, if different	Md intl /suf fix	SSN	Relationship	DOB	Month lived with you	Child care /tuition exp?

1. Does taxpayer or spouse have tuition/continuing education expense?
  - a. Is it for a degree?
  - b. Freshman, Sophomore, Junior, or Senior?
  - c. Have you ever taken a tuition deduction before?
  - d. Are you a convicted felon?
  - e. Did you use any Series EE or I bonds
  - f. Provide Form 1098-T
2. Any moving expenses?
3. If teacher, do you have any educator expense?
4. Are you a reservist?
5. Did you receive or pay any alimony?
6. Did you contribute to an IRA?
7. Do you have any Student loan expenses?

## Income

- Form(s) W-2 ' Wages, Salaries, Tips and Other Compensation
- Form(s) 1099-R ' Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc
- Form(s) SSA-1099 ' Social Security/Railroad Benefits **Taxpayer Spouse**
- Form(s) 1099-MISC ' Miscellaneous Income
- Form(s) 1099-INT ' Interest Income
- Form(s) 1099-DIV ' Dividend Income
- **Form(s) 1099-B, 1099-S ' Sales of Stocks, Bonds, Real Estate, etc**
  - all stock sale transaction information, including initial cost information.
- Form(s) 1099-G ' Certain Government Payments, Schedule K-1s ' Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G
- Gambling or Lottery Winnings, Form(s) 1099-Q ' Payments from Qualified Education Programs
- **Other Income:**
  - Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

## Deductions

- **Medical and Dental Expenses**
  - Prescription medications
  - Health insurance premiums
  - Doctors, dentists, etc
  - Eyeglasses and contact lenses
  - Miles driven for medical purposes- Provide a log
  - Lodging
  - Long term care
- **Noncash / Cash Charitable Contributions- Provide receipts with dates and descriptions**
- **Miscellaneous Deductions**
  - Union and professional dues
  - Professional subscriptions, books, supplies
  - Uniforms and protective clothing (including cleaning)
  - Tools
  - Job search costs
  - Educator expenses
  - Expenses that your employer didn't reimburse you for
  - Mileage for work (not commuting), provide log
  - Tax return preparation fees
  - Safe deposit box rental
  - Investment management/consulting fees
  - Gambling losses (to the extent of gambling income)
  - Do you have a home office?
- Real estate taxes paid on principal residence
- Real estate taxes paid on additional homes or land
- Personal Property tax on vehicles
- Home mortgage interest paid Form(s) 1098
- Did you buy, sell or refinance a home- provide Hud Statements

**If answering yes to any of the below, please provide receipt or explanation.**

- 1** Did a lender cancel any of your debt? (Attach any Forms 1099-A or 1099-C)
- 2** Did you make energy efficient improvements to your home or purchase any energy-saving property?
- 3** Did you purchase a motor vehicle or boat?
- 4** Did you purchase a hybrid or electric vehicle?
- 5** Did you donate a vehicle? If **yes**, attach Form 1098C
- 7** Did your marital status change during ?
- 8** Were you or your spouse permanently and totally disabled?
- 9** Do you have dependents who must file?
- 10** Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,100?
- 11** Did you provide over half the support for any other person?
- 12** Did you incur adoption expenses?
- 13** Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution?
- 14** Did you incur any casualty or theft losses that insurance didn't cover?
- 15** Did you pay any individual for domestic services in ?
- 16** Did all members of your household have health insurance coverage for the full year? provide forms 1095-A, B, or C
- 17** If receiving a refund, would you like your refund direct deposited?
  - a** Provide banking information
  - b** Would you like it deposited to a My IRA account?
- 18** If you have a balance due, would you like to have it electronically withdrawn?  
Would you like to set up a payment plan?
- 19** Did you make any estimated tax payments?
- 20** Do you have, or are you a cosigner on a foreign bank account?
- 21** Did you make any purchases online that you did not pay sales tax on?