

CUSTOMER DATA SHEET

To ensure optimum tax service and to always maintain accurate records, please complete the following form.

Referred by (Last Name, First Name) _____

Who prepared your last year's Tax return? _____

Primary Name _____ SSN _____

Birthdate _____ Occupation _____

Address _____
 _____ (City, State, Zip)

Phone _____ (home) _____ (cell) Provider _____

Email address _____

Spouses Name _____ SSN _____

Birthdate _____ Occupation _____

Address (if different from primary) _____
 _____ (City, State, Zip)

Phone _____ (home) _____ (cell) Provider _____

Email address _____

Dependent Information

First, Initial, Last Name	Social Security Number	Relationship	Date of Birth	# Months lived with

Child Care Information (Note: This information is required for each provider)

SSN/EIN _____ Provider's Name _____

Provider's Address _____ Annual Amount paid \$ _____

Please check all of items that are applicable to the primary or spouse of the return.

- Did you have health insurance for the entire year? ___ Yes ___ No, why not? _____
- Can you be claimed as dependent/s? _____
- Are you a homeowner? Purchase Date: _____
- Are you active Military? _____
- Did you have unreimbursed employee expenses? _____
- Do you have any outstanding debts? (Defaulted student loans, prior year back taxes, back child support, etc.) _____
- Do you own a business? ___ Yes ___ No
- Do you own more than one home? _____
- Do you own rental property? (Address Please)
- Did you have educational expense/student loan payments?

I CERTIFY THAT I WOULD LIKE MY TAXES PREPARED ACCORDING TO THE INFORMATION I SUPPLIED ABOVE.

Taxpayer's Signature: _____

Date _____

Spouse's Signature: _____

Date _____

PERSONAL DATA

- Social Security Cards (including self, spouse, & dependents)
- Driver’s license or ID Card
- Child Care Provider: Name, Address, Tax ID# or SSN, & Amount Paid
- Education Expense: 1098T
- Prior Year Taxes

EMPLOYMENT & INCOME DATA

- W-2 forms for this year
- Unemployment compensation: Form(s) 1099-G
- Miscellaneous income including rent: Form(s) 1099-MISC
- Pensions and Annuities: Form(s) 1099-R
- Social Security Benefits: Form(s) SSA 1099
- Partnerships & S Corporations: Schedule K-1
- State and Local Income Tax Refunds: Form(s) 1099-G
- Gambling and Lottery winnings: Form W-2G
- Interest Income: 1099 INT
- Dividend Income: 1099 INT
- Proceeds from Stocks: 1099-B
- Sale of Home Income (Loss): 1099-B
- Cancellation of Debt: 1099-C
- Bankruptcy: 1099-A
- Tip / Other Income

<u>Direct Deposit Information:</u>	
Bank Name:	_____
Routing #:	_____
Account #:	_____
	<input type="radio"/> Checking <input type="radio"/> Savings
Signature:	_____

ITEMIZED DEDUCTIONS

- Mortgage Interest Statement: Form(s) 1098
- Real Estate Taxes Paid
- Personal Property Taxes: Ad Valorem
- Charitable Donations
- Church Tithes & Offering
- Unreimbursed Job Expenses
- Unreimbursed Medical Expenses
- Current year settlement statement (purchase of new home/refinance)

ADJUSTMENTS

- Student Loan Interest Paid
- IRA Contributions
- Early Withdrawal Penalties
- Moving Expenses
- Tuition and Fees

SELF-EMPLOYMENTT DATA

- Business Income: Form(s) 1099 MISC and/or own records
- Partnership Income: Schedule K-1/Corporation income
- Business-related expenses: receipts and other documents
- Employment taxes & other estimated business taxes paid for current tax year
- Tax ID number or Incorporation papers