



Accounting

Household Information

Taxpayer's Name _____ SSN _____ Occupation _____

Spouse's Name _____ SSN _____ Occupation _____

Home Address _____

City, State, or Post Office County State Zip Code School District

Telephone Number Telephone Number(Taxpayer) Telephone Number(Spouse)

Home(____) _____ Office(____) _____ Office(____) _____

Email _____ Fax(____) _____ Fax(____) _____

Taxpayer: Date of Birth _____ Blind? - Yes ____ No ____

Spouse: Date of Birth _____ Blind? - Yes ____ No ____

Dependent Children Who Live With You:

<u>Full Name</u>	<u>SSN</u>	<u>Relationship</u>	<u>Birth Date</u>

Other Dependents:

<u>Full Name</u>	<u>SSN</u>	<u>Relationship</u>	<u>Birth Date</u>	<u># Months Resided in Your Home</u>	<u>% Support Provided By You</u>

When you come don't forget these forms!

Income:

W-2

1099s: 1099-R (Retirement Distributions)
1099-INT (Interest Income)
1099-DIV (Dividend and Capital Gain Income)
1099-B (Stock Proceeds) - Please check to see if all sales have corresponding cost info
1099-MISC (Self Employment)
1099-K (If you accept credit cards or Paypal from customers your credit card company will issue this)

SSA (Social Security Income)

99G (Unemployment Received)

Alimony Received

1099-A and 1099-C (Debt Cancellation and Property Foreclosures)

Rental Income

Did you have > \$10,000 in foreign assets at any time during 2012?

If yes, please bring info on interest income and max account values during year.

Deductions and Credits:

1098-T (Tuition Statement for College Education)

Bring all Adoption Papers and proof of expenses for new Adoption Credit

Charitable Donations - Please bring receipts for all Charitable Donations

Form 1098 Mortgage Interest Paid

1098-E Student Loan Interest Paid

Proof that children live with you from school, health records or other documents

Estimated Tax Payments - Please bring list of date and amount of each payment made

Other:

Copy of the last 3 year's taxes (if new client)!

Settlement Statements for any sale, purchase or refinance of properties

Signed Release of Exemption Form 8332 if you are claiming a child that does not live with you

Signed Engagement Letter

Voided Check (for Direct Deposit Purposes)

If you enrolled in a health plan through employer, private insurance, Medicare, or Medicaid, make sure to bring Form 1095-C or 1095-B.

If you purchased a health plan through a Health Insurance Marketplace, bring along Form 1095-A.