

**PLEASE INCLUDE ALL OF YOUR TAX INFORMATION SENT TO YOU,
INCLUDING W-2'S, ANY 1099 AND 1098 FORMS, AND YOUR PROPERTY TAX STATEMENT**

Name	
Social Security Number	
Date of Birth	
Occupation	
Address	
City, State, Zip	
Telephone Number	
E-mail Address	
Spouse's Name	
Social Security Number	
Date of Birth	
Occupation	
Dependent's Name (For Each Dependent)	
Social Security Number	
Date of Birth	
Relationship To You	
Number of Months Lived with You	
Child Care Expenses Paid	
Child Care Provider Name	
Child Care Provider Address	
Child Care Provider Tax ID Number	
School Grade	
Qualified School Expenses (Click Here)	
(See Below for Additional Dependents)	
Do You Want Direct Deposit/Withdrawal?	
Name of Financial Institution	
Checking or Savings?	
Routing Number	
Account Number	

Basic Income and Deductions	
Wages (W-2's and K-1's)	
Bank Interest (and Bank Name)	
Dividend Income (and Name of Financial Institution)	
Stocks or Bonds	
Date Purchased	
Initial Cost (Include Fees)	
Date Sold	
Amount Sold for (Minus Fees)	
IRA's, Pensions, Annuities (Form 1099-R)	
Payments for Higher Education	
Student Loan Interest	
Self-Employed Income and Expenses	
Rental Income and Expenses	

Itemizing (Schedule A)	
Medical Expenses	
State and Local Income Taxes Paid	
Property Tax (PLEASE Bring Property Tax Statement)	
Car "Tabs"	
New Motor Vehicle Taxes	
Mortgage Interest	
Mortgage Insurance	
Gifts to Charity-Cash or Check	
Charity Name and Date Contributed	
Gifts to Charity-(Non-cash, Including Thrift Stores)	
Charity Name and Date Contributed	
Casualty and Theft Losses	
Unreimbursed Employee Business Expenses	
Tax Preparation Fees	
Other expenses—investment, safe deposit box, etc	
Other	