

General Information

Name
Current Address
Social Security Number
Date of Birth
List of Dependents (including SSN & DOB)
Voided Check (optional for direct deposit)
Prior Year Tax Return (new clients only)

Income

W-2s
1099s
1099-Rs (Pension and IRA Distribution Statements)
Interest Income Statements
Dividend Income Statements
Unemployment Compensation
Social Security
Alimony Received
Gambling Winnings
Other Income

Expenses/Deductions

Medical/Dental Expenses
Real Estate Taxes
Automobile Taxes (adv. amount only)
Home Mortgage Interest & Points
Donations/Tithes
Deductible Job Expenses
Casualty & Theft Losses
Other Expenses/Deductions

Small Businesses/Farming/Rental Activities

Sales
1099 Income
Other Income Figures
Equipment Purchases & Related Information
Purchases/Merchandise
Advertising
Car and Truck Expenses/Mileage Figures
Insurance
Loan Interest
Office Expense
Rent
Repairs & Maintenance

Supplies
Shipping/Freight/Postage
Taxes & Licenses
Travel
Meals & Entertainment
Utilities
Telephone
Contract Labor
Wages
Hay & Feed
Seeds
Fertilizer
Vet Bills
Chemicals
Gas, Fuel & Oil
Commissions
Legal & Accounting
Other Expense Figures

Other Information

IRA Contributors
Student Loan Interest
Tuition Payments (1098-T)
Estimated Tax Payments
Stock Transactions
Home Office Deduction Information

Not all of this information will be necessary to each individual tax return