Courtesy of 411Taxes.com

You may write "same" for any information (except for your name(s)) that is exactly the same as what you provided us last year, such as social security numbers and bank information.

General Information

	TAXPAYER		SPOUSE Complete if married on Dec. 31, 2012
Last Name:		Last Name:	
First Name:		First Name:	
Middle Initial:		Middle Initial:	
Social Security #:		SSN or ITIN:	
Date of Birth:		Date of Birth:	
Current Employer:		Current Employer:	
Occupation in 2011:		Occupation in 2011:	

Taxpayer:
- U.S. Citizen ☐
- Green Card ☐
- U.S. Visa ☐ Citizen of:
- N/A ☐

Spouse:
- U.S. Citizen ☐
- Green Card ☐
- U.S. Visa ☐ Citizen of:
- N/A ☐

Referred By: *(new clients)*

Contact Information

we will primarily contact you by email.

Email √ next to primary email address
- Email Work: ☐
- Email Personal: ☐
- Email Other: ☐

Telephone:
- Work
- Mobile
- Home

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Current Address: (street, city, state, zip) From (mm/dd/yy) To (mm/dd/yy)

Address	From	To
		Present

Mailing Address for IRS correspondence, if different (i.e., PO Box, work address, etc.).

Residency & Employers

Complete if you lived at any other location during 2012:

Taxpayer (T), Spouse (S), Joint (J)

T/S/J	Address (street, city, state, zip)	From (mm/dd/yy)	To (mm/dd/yy)
T			Present

Employers during 2012:

Taxpayer (T), Spouse (S)

T/S	Employer:	Occupation	From	To	Where worked (state or country)
T				Present	

Dependents

(Do not list spouse)

First Name, Initial, Last Name	SSN or ITIN	Date of Birth (mm/dd/yy)	Relationship to You	Child Care Expenses While You Are At Work* (incurred & paid in 2012)

☐ Check if you were a noncustodial parent in 2012 who is claiming a child as a dependent per your divorce decree.

Dependent Child Care Expenses Incurred while you [and spouse] were working or looking for work

Care Provider's Name	Care Provider's Address	SSN or EIN	Amount Paid

If you have a dependent child for whom you paid **college/university tuition**, please refer to the education worksheet

Direct Deposit & Electronic Funds Withdrawal

Name of US Bank ______ *(must be a U.S. bank)*

☐ Checking ☐ Savings

☐ Personal Acct ☐ Business Acct

Routing Number ______ *(9-digit number on the bottom left of a check)*

Account Number ______

Electronic Withdrawal of any Tax Balance Due

Please select a withdrawal date (if no date is selected, you will have to mail in a check for any tax balance due).

☐ April 17 ☐ The date the tax return is e-filed

Work Related Moving Expenses

(1) Move must be closely related to a new or changed job location in the U.S.;
(2) Have moved at least 50 miles farther from your old home than your old job was;
(3) If employee, you must have worked at the new job for at least 39 weeks, if self employed, at least 78 weeks.

From: ______
To: ______
$ ______ Moving of household goods
$ ______ Travel expense
$ ______ Lodging en route to new home.

From: ______
To: ______
$ ______ Moving of household goods
$ ______ Travel expense
$ ______ Lodging en route to new home.

Mortgage Interest & Property Tax ☐ Yes ☐ No

Amounts for up to two residences that you lived in during 2012 (can be in the U.S. or abroad).
For rental properties, please list separately on the **Rental** worksheet.

Mortgage Interest	TAXPAYER	SPOUSE	JOINT	**Not** Reported on Form 1098
Primary Residence	$	$	$	☐
Primary Residence	$	$	$	☐
Second Home	$	$	$	☐
Second Home	$	$	$	☐
	0	0	0	
Points Paid (if any)	$	$	$	☐
Property Tax				
Primary Residence	$	$	$	☐
Second Home	$	$	$	☐
Additional Personal Residences	$	$	$	☐

Additional Information: *Please check if any of these situations apply to you.*

☐ Your total mortgage balance was more than $1,100,000 during 2012 (including a second home if you have one)

☐ You sold a home during 2012
☐ You paid property taxes on a foreign residence.

Charitable Contributions

Must be to a Qualified U.S. Charity

Charitable contributions must be supported with a donation receipt, letter or bank record.

Contributions of clothing and household goods must be in good used condition or better.

	TAXPAYER	SPOUSE	JOINT
Cash, Checks, or Credit Cards	$	$	$
Noncash	$	$	$
Miles driven to donate goods or perform charitable services	miles	miles	miles

***If noncash charity totals more than $500, please either email or fax me your receipts OR provide the following:**

Name of Charity	Address of Charity	Goods Donated (clothes, etc.)	Date Donated	Used Value

Other Deductions

Deductions	TAXPAYER	SPOUSE	
Medical & Dental Expenses	$	$	
Margin Interest	$	$	$
Personal Property Taxes	$	$	$
Investment Advisory Fees	$	$	$
Job Search Costs	$	$	
Safe Deposit Box Fee	$	$	$
IRA Custodial Fee	$	$	$
Tax Prep Fee paid in 2012 *(new clients)*	$	$	$
HSA Contribution for 2012 *(contributed by you, not your employer)*	$	$	

Employee Business Expenses

Please attach Employee worksheet to list business expenses related to W2 income that you were not reimbursed for. available on our website

	TAXPAYER	SPOUSE	
Student Loan Interest Paid:	$	$	*(only interest is deductible, not principal)*

If your adjusted gross income is greater than $75,000 (single) or $150,000 (married), you cannot claim the deduction.

Tuition & Scholarships

If you or spouse were a student during 2012, or you paid for your dependent child's college/university tuition, please provide form 1098-T

Checklist of Forms to Send Me

Check the forms below that you received (or should receive) for 2011, and then fax or email me a copy of each one. Unless otherwise instructed, you don't need to enter the information from the form on this questionnaire.

	TAXPAYER	SPOUSE	JOINT	
Wages (Form W-2)	☐	☐		
Self-Employment (1099-MISC) *	☐	☐		*Also complete **Self Employment** worksheet

Merchant/Credit Card (Form 1099-K)*	☐	☐	☐	
Interest (1099-INT)	☐	☐	☐	
Dividends (1099-DIV)	☐	☐	☐	
Sales of Securities (Form 1099-B) *	☐	☐	☐	*Also complete **Trades** worksheet
Unemployment Compensation (1099-G)	☐	☐		
Tax Overpayment (1099-G)*	☐	☐	☐	*State refund received during 2011, which may be taxable
Partnership/S-Corp/Trust/Estate (Sch. K-1)	☐	☐	☐	
Retirement Distributions (1099-R)	☐	☐		
Foreigner's U.S. Source Income (1042-S)	☐	☐		
Mortgage Interest (Form 1098)	☐	☐	☐	
Student Loan Interest (1098-E)	☐	☐		
Tuition Expense (Form 1098-T)	☐	☐		
Moving Expense Report	☐	☐		
HSA or Archer MSA (5498-SA or 1099-SA)	☐	☐		
2010 Tax Return (New Clients Only)	☐	☐	☐	
Other Tax Form	☐	☐	☐	Specify:

I certify that all of the information avobe is true and correct and proof is available should the need arrise.

Signature: ______________________________ Signature: ______________________________