

DEPENDENTS* (or persons living in your household)

Name	Relationship	Date of Birth	SSN	Mos. Lived w/ you	Full Time Student	Disabled

*If any dependents listed did not live at the taxpayer’s address the entire year, please discuss this with your tax professional. This is critical to help us help you accurately report your residency and dependency to the tax authorities.

<p>INCOME: (Check all that apply & include documents)</p> <ul style="list-style-type: none"> Employer (W-2) Self-Employment* Interest (1099-int) Social Security (SSA-1099) Retirement plan distribution* (1099-R) Dividends (1099-Div) Rental Property* Stock or Mutual Fund sale (1099-B) Unemployment (1099-G) 	<p>EXPENSES: (Check all that apply & include documents)</p> <ul style="list-style-type: none"> Self Employment* Education Rental Property* Medical/Dental care Un-reimbursed by your employer Union Dues 	<p>CREDIT & DEDUCTIONS: (Check all that apply & include documents)</p> <ul style="list-style-type: none"> Donation to a charity? Pay Student Loan interest? Mortgage Payment (1098) Major taxable purchase Pay Child/Department care expense? IRA Contribution Pay Property Taxes? HSA Contribution?
<p>HEALTH INSURANCE: (Check all that apply & include documents)</p> <p>Were you or any members of your household:</p> <ul style="list-style-type: none"> Covered by a qualified employer, private or government health insurance plan? Enrolled in a health insurance plan through the federal or state marketplace? 	<p>MISCELLANEOUS*: (Check all that apply)</p> <ul style="list-style-type: none"> Sell a home? Pay/Receive alimony? Adopted a child? Suffer a catastrophic loss? Have gambling winnings/losses? Change in marital 	<p>If you receive a refund, please select a disbursement method:</p> <ul style="list-style-type: none"> Direct Deposit Check mailed directly from IRS

*If this applies, we recommend you meet with your tax professional to discuss your tax situation before dropping off your information.

TAX ADVISOR OR CLIENT SERVICE PROFESSIONAL COMPLETE THE SECTION BELOW:

Legal Disclaimers

Client received Privacy Policy, Consent to Use Disclose Service Provider documents, and the documents were explained and executed as applicable.	Yes	No
Did the client review and sign the Client Service Agreement?	Yes	No