

# READ THIS FIRST

This booklet is designed to help you maximize your deductions and minimize problems in preparing and filing your tax return.

Please keep in mind that taxes can be very complicated and even though this booklet will accommodate most taxpayers' needs, if you have a special situation not covered, please list it under "Questions You May Have."

The **"ALERT FLAGS"** designate certain special conditions as follows:



Indicates areas that need to be completed by new clients.



Indicates areas that **MUST** be completed by new clients and only needs to be filled in by existing clients when the information has changed.



The most important flag of all, denotes areas where the IRS has concentrated their computer matching programs. If the information provided is incorrect, it may trigger a service center audit. Pay particular attention to any special instructions in areas with this flag.



## TAXPAYER INFORMATION

Your Name			
Social Security #		Birth Date	
Home Phone		Work Phone	
Occupation			
Spouse Name			
Social Security #		Birth Date	
Home Phone		Work Phone	
Occupation			



## ADDRESS & STATUS

Street			
City		State	ZIP
Status Changes This Year	Dates	Status Changes This Year	Dates
<input type="checkbox"/> Married		<input type="checkbox"/> Dependent Deceased	
<input type="checkbox"/> Separated		<input type="checkbox"/> Sold Home	
<input type="checkbox"/> Divorced		<b>Legally Blind</b>	
<input type="checkbox"/> Moved		<input type="checkbox"/> Filer	
<input type="checkbox"/> Spouse Deceased		<input type="checkbox"/> Spouse	



## ESTIMATED TAXES PAID

Please provide cancelled checks

	Date Due	Date Paid	Federal	State
Applied From Prior Year's Refund				
First Quarter	APRIL			
Second Quarter	JUNE			
Third Quarter	SEPT			
Fourth Quarter	<b>THIS JAN</b>			



## SPECIAL INFORMATION

\*\* Must be reported even if NOT taxable unless TRANSFERRED

	You	Spouse
Employer Pension Plan?	<input type="checkbox"/>	<input type="checkbox"/>
<b>Conventional IRA, Keogh and SEP Plans:</b>		
Contributions		
Withdrawals		
Rollovers**(1)		
<b>Roth IRA: (1) If rolled from a conventional IRA to a Roth IRA the rollover can be taxable.</b>		
Contributions		
Withdrawals		
Rollovers**(1)		
State Tax Refund		
Social Security or Railroad Retirement		
Alimony Received - Matched with Payer		
Tips Received		
Unemployment Received		
Gambling Winnings		
Foreign Bank Account	<input type="checkbox"/>	<input type="checkbox"/>
Do you wish to contribute a portion of your taxes to the Presidential Campaign Fund?	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____		
Other: _____		
<input type="checkbox"/> <input checked="" type="checkbox"/> If you incurred any adoption expenses this year?		
Salaries, Pensions, & Misc Income	Provide W-2s and 1099s	
Partnership & Trust Income	Provide K-1s	
Student Loan Interest Paid		
Education IRA Contribution		
<input type="checkbox"/> <input checked="" type="checkbox"/> If you have been denied earned income credit by the IRS. If so, have you been re-certified? <input type="checkbox"/> Yes <input type="checkbox"/> No		
<input type="checkbox"/> <input checked="" type="checkbox"/> If you bought, sold, or gifted real estate last year. If so, please call in advance to discuss what documents are required.		

## REFUND DIRECT DEPOSIT

Complete for refund direct deposit

Banking Routing Number:	<input type="text"/>
Account Number:	<input type="text"/>
Type:	<input type="checkbox"/> Checking <input type="checkbox"/> Savings