



TAX YEAR: _____

Client Information Sheet

Taxpayer Information

First Name	M.I.	Last Name (As appears on your SS Card)	
Occupation	Social Security #	—	—
		Date of Birth	— —

Spouse Information

First Name	M.I.	Last Name (As appears on your SS Card)	
Occupation	Social Security #	—	—
		Date of Birth	— —

Address

Street		Apartment #	
City	State	Zip Code	

Email Address	Cell Phone	Work Phone	Home Phone
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Filing Status

Single
 Married filing jointly
 Married filing separate
 Head of Household.
 Qualifying widow(er)

Dependents

First Name & MI	Last Name	Relationship	Social Security #	Date of Birth
			— —	— —
First Name	Last Name	Relationship	Social Security #	Date of Birth
			— —	— —
First Name	Last Name	Relationship	Social Security #	Date of Birth
			— —	— —
First Name	Last Name	Relationship	Social Security #	Date of Birth
			— —	— —

Child Care Provider Information

Name	Social Security or EIN #	Amount Paid	
		\$	
Street	City	State	Zip

<p>TAX DOCUMENTS:</p> <p> <input type="checkbox"/> W-2 Wages and Income Statement <input type="checkbox"/> W-2G Gambling Winnings <input type="checkbox"/> 1099-Misc Self- Employment, Rental or Royalty Income. <input type="checkbox"/> 1099-Int Interest Income <input type="checkbox"/> 1099-Div Dividend Income <input type="checkbox"/> 1099-G State & Local Income Tax Refund or Other Government Payments <input type="checkbox"/> 1099-R Distributions from IRA or other retirement plans. <input type="checkbox"/> 1099-SSA Social Security Income <input type="checkbox"/> 1098 Mortgage Interest Statement <input type="checkbox"/> 1099T College Tuition/Student Loan Interest Paid <input type="checkbox"/> 1099B Proceeds from Broker Transactions <input type="checkbox"/> Other Ad-Valorem Tax <input type="checkbox"/> Other </p>	<p>Foreign Assets QUESTIONAIRE</p> <p>Answering YES to any question below will require additional information to be reported on IRS Form 8938</p> <p> Did you have a foreign bank or financial institution account with \$10,000 USD or more at any time during the year? YES <input type="checkbox"/> NO <input type="checkbox"/> </p> <p> Do you have any real estate valued over \$50,000 USD - Personal and/or Rental? --> Foreign only YES <input type="checkbox"/> NO <input type="checkbox"/> </p> <p> Do have any foreign stocks or bonds? YES <input type="checkbox"/> NO <input type="checkbox"/> </p> <p style="text-align: center;">FAILURE TO REPORT ANY OF THE ABOVE INFORMATION WILL RESULT IN A MINIMUM PENALTY OF \$10,000</p>
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I verify that the information presented above is true, complete and correct.

Taxpayer Signature

Date