

Basic Information and Income

Forms, Documents, etc to Bring In:

Reported on: _____

Any changes or if you are new:

Name

Address

Single, Married or Head of Household

Phone #

Email address

Did you get married?

Spouse's name per Social Security Administration

Spouse's Date of Birth

Spouse's Social Security Number

Did you have any children this year?

Child's name

Child's Date of birth

Child's Social Security Number

Are you financially supporting anybody new?

Person's name

Person's relationship

Person's Date of Birth

Person's Social Security Number

Prior year's Tax Return if we didn't prepare it

Yours

Your spouse's

All my Wage Reports & Statements

W2s

All my spouse's Wage Reports and Statements

W2s

Interest Income

1099 - Int

Dividend Income

1099 - Div

Tax Refund Notice from your state

1099 - G

Alimony Received divorce decree finalized prior to Jan 1, 2018

	Forms, Documents, etc to Bring In:	Reported on:
<input type="checkbox"/>	Business Income & Expenses	per your records
<input type="checkbox"/>	Capital Gains (the sale of stocks and other investments)	1099 - B
<input type="checkbox"/>	IRS Distributions	1099 - R
<input type="checkbox"/>	Pension Distributions	1099 - R
<input type="checkbox"/>	Rental Income & Expenses	per your records
<input type="checkbox"/>	Farm Income & Expenses	per your records
<input type="checkbox"/>	Unemployment Compensation	1099 - G
<input type="checkbox"/>	Social Security Benefits	SSA - 1099
<input type="checkbox"/>	Railroad Retirement Board benefits	RRB - 1099
<input type="checkbox"/>	Gambling Winnings	W2 G
<input type="checkbox"/>	Other Income	per your records
<input type="checkbox"/>	Cancellation of Debt	1099 - C

Direct Deposit Information		New Bank Information if applicable
Bank Name	Per your records	
Routing number	Per your records	
Account number	Per your records	
Account type	Per your records	