



# CLIENT INFORMATION SHEET

TAXPAYER LAST NAME \_\_\_\_\_ FIRST NAME \_\_\_\_\_

SSN: \_\_\_\_\_ DATE OF BIRTH \_\_\_\_\_

SPOUSE LAST NAME \_\_\_\_\_ FIRST NAME \_\_\_\_\_

SSN: \_\_\_\_\_ DATE OF BIRTH \_\_\_\_\_

TELEPHONE NUMBER _____ _____
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ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIPCODE \_\_\_\_\_

DEPENDENT NAME (First/Last) eg. Samuel. SMITH	DATE OF BIRTH eg. 01/01/2020	SSN/ITIN eg. 555-55-5555	HOW RELATED eg. Son/Daughter	MTHS LIVED IN eg. 9 months

### CIRCLE ALL THAT APPLY

- |                               |                             |                          |
|-------------------------------|-----------------------------|--------------------------|
| W2 - WAGES                    | 1099-INT - INTEREST INCOME  | CHARITABLE CONTRIBUTIONS |
| 1099-MISC                     | 1099-DIV - DIVIDEND INCOME  | PROPERTY TAXES           |
| 1099-NEC (NON EMP. COMP.)     | 1099-R - PENSION/RETIREMENT | 1098 - MORTGAGE INTEREST |
| 1099-B - SHARES/STOCK S       | 1099-SSA - SOCIAL SECURITY  | MORTGAGE POINTS PAID     |
| MOVING EXPENSES (MILITARY)    | MINERAL RIGHTS INCOME       | MEDICAL EXPENSES         |
| 1099-G - UNEMPLOYMENT         | TIPS/OTHER INCOME           | TAX PREPARATION EXPENSE  |
| ALIMONY (AGMT PRIOR 1/1/2019) | FARM INCOME                 | BOUGHT/SOLD PROPERTY     |
| EDUCATION EXPENSES            | RENTAL PROPERTY INCOME      | W2-G - GAMBLING INCOME   |

### CHILD CARE INFORMATION

PROVIDERS NAME \_\_\_\_\_ EIN/SSN \_\_\_\_\_

PROVIDERS ADDRESS \_\_\_\_\_ AMOUNT PAID \$ \_\_\_\_\_

**I CERTIFY THAT I WOULD LIKE MY TAXES PREPARED ACCORDING TO THE INFORMATION I SUPPLIED ABOVE**

TAXPAYER SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

SPOUSE SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_