

TAX QUESTIONNAIRE

Thank you for choosing Taxes 'N Books, we look forward to seeing you. Please remember to bring the following to your appointment:
(1) All wage statements and records of income earned, (W2's, 1099's, K-1's, 1099-INT / DIV, etc.). **(2)** Receipts / Records of all contributions
(3) Mortgage Interest, **Closing statements on any property purchased, sold or refinanced last year**, (1098's, HUD 1's)
(4) For new clients; A copy of your prior year tax return. **(5)** A list of any questions you may have.

Please check any of the following that may apply to you:

- Any births, adoptions, marriages, divorces or deaths in your immediate family last year?
- Did you provide the support for anyone other than your immediate family? Did they live with you?
- Do you travel between two different jobs in the same day or run errands for your employer?
- Did you receive any letters from the IRS or FTB about changes to your return or for any other reasons?
- If you are due a refund, Would you like to have it Directly Deposited into your bank account?
- Does anyone owe you money which has become uncollectable?
- Do you have a business or investment loss from the previous year to carry forward?
- Did you pay **Alimony**? \$ _____ **Name** _____ **SSN** _____
- May the IRS discuss this tax return with your preparer?
- Do you anticipate buying or selling real estate this year?
- Did you or are you expecting to lose your property to: **Foreclosure? or Short Sale?**
- Do you have any Foreign Bank Accounts, Property or Income?
- Did you pay interest on a **Student Loan**? **TP** _____ **SP** _____
- Are you Registered as a Domestic Partner with the State of California?
- Did you make any purchases either: **On-Line or Out-Of-State?**

PERSONAL INFORMATION

Home or Primary Phone Number: _____

Street Address: _____ City / Town: _____ St: _____ Zip: _____

<u>Taxpayer:</u>	<u>Spouse:</u>
Name: _____	_____
Social Security #: _____	_____
Occupation: _____	_____
BirthDate /Tuition Pd: _____ \$	_____ \$
Work / Cell Number: _____	_____
E-mail Address: _____	_____

CHILDREN AND DEPENDENTS

Full Name:	Date of Birth:	Social Security Number:	Relationship:	Mo.@ Home:	Tuition / Income:

ESTIMATED TAXES PAID Overpayment from last years taxes applied to: **Federal \$:** _____ **State \$:** _____

Dates / Amounts Paid to:	Federal:	State:	Dates / Amounts Paid to:	Federal:	State:
1st Quarter: _____			3rd Quarter: _____		
2nd Quarter: _____			4th Quarter: _____		
Paid with extension on April 15th: _____			Totals Paid for the Tax Year:		

INDIVIDUAL RETIREMENT ACCOUNT: (TRADITIONAL IRA OR SEP / IRA OR ROTH IRA)

Taxpayer's IRA: Traditional ROTH SEP/ SIMPLE Amount Contributed: _____
 Spouse's IRA Traditional ROTH SEP/ SIMPLE Amount Contributed: _____

(Contributions can be made until April 15th for the previous years taxes for IRA & ROTH and until the extension due date for SEP IRA, etc.)