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:

NEW CLIENTS — Indicates areas that need to be completed by new clients.

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

IRS MATCH — 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.

NEW CLIENTS — TAXPAYER INFORMATION

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

CHANGE ONLY — ADDRESS & STATUS

Street					
City		State		ZIP	

Status Changes This Year	Dates	Status Changes This Year	Dates
❑ Married		❑ Dependent Deceased	
❑ Separated		❑ Sold Home	
❑ Divorced		**Legally Blind**	
❑ Moved		❑ Filer	
❑ Spouse Deceased		❑ Spouse	

IRS MATCH — 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	**THIS** JAN			

IRS MATCH — SPECIAL INFORMATION

** Must be reported even if NOT taxable unless TRANSFERRED	You	Spouse
Employer Pension Plan Coverage?	❑	❑
Conventional IRA, Keogh and SEP Plans:		
Contributions		
Withdrawals (provide 1099-R)		
Rollovers**(1)		
Roth IRA: (1) **If rolled from a conventional IRA to a Roth IRA the rollover can be taxable.**		
Contributions		
Withdrawals (provide 1099-R)		
Rollovers**(1)		
State Tax Refund (provide1099-G)		
Social Security or RR (provide SSA-1099/RRB-1099)		
Alimony Received – Matched with Payer		
Tips Received		
Unemployment Received (provide 1099-G)		
Gambling Winnings (provide W-2G)		
Foreign Bank Account	❑	❑
Do you wish to contribute a portion of your taxes to the Presidential Campaign Fund?	❑	❑
Other:		
Other:		

❑ ✓ 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 (provide 1098-E)	
Coverdell Account Contribution	

❑ ✓ If you have been denied earned income credit by the IRS. If so, have you been re-certified? ❑ Yes ❑ No

❑ ✓ 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:	☐☐☐☐☐☐☐☐☐
Account Number:	☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐
Type:	☐ Checking ☐ Savings

Note: If you wish to direct deposit to multiple accounts (max. 3), please provide the information above for the additional accounts and specify how the refund is to be allocated.