



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 |
|---------------|------------|------------|------------|

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> |
|--|--|

I verify that the information presented above is true, complete and correct.

Taxpayer Signature

Date