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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:* ________

	Taxpayer:		***Spouse:***	
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.)