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Personal Data

	Taxpayer	Spouse
Last Name		
First Name & Initial		
Social Security Number		
Occupation		
Data of Birth		
Email Address		
Phone		
Mailing Address		
City, State, Zip		
Direct deposit bank routing number		
Direct deposit bank account number		

Dependent Data

	Dependent #1	Dependent #2
Last Name		
First Name & Initial		
Relationship		
Social Security Number		
Data of Birth		
Child Care Expenses		
How many months of the year does the dependend reside at your primary residence?		

Please provide the following:

Support for sources of income:

- Form(s) W-2
- Form(s) 1099 - Interest, Investment Income, Retirement Distributions
- Form(s) 1099B - Investment Sales
- Schedule(s) K-1
- Unemployment Income

Support for itemized deductions (see Deductions tab, page 2):

- Mortgage interest - Form 1098-INT
- Receipts for real estate taxes paid
- Receipts for charitable donations (cash and non-cash)
- Summary of medical expenses out-of-pocket (if the total exceeds 10% of your income)
- Support for large purchases (cars, boats, etc...) for the sales tax deduction

Support for other adjustments or credits:

- Student Loan Interest
- IRA Contributions
- Tuition and Education Expenses (for you or your dependents)
- Day Care Expenses
- Moving Expenses (if relocated more than 50 miles for work)
- Out-of-pocket Expenses for Qualified Educators
- HSA Contributions

If you bought or sold a home during the year, please provide copies of the settlement statement (HUD)

If you bought a car during the year, please provide a copy of the bill of sale

Date and amount of any estimated tax payments made during the year, if any.

Copy of last filed tax return.