



2016 Tax Information Form

Prepared By: _____ Received Date: _____ Completed Date: _____

Client 1 Name:	Client 2: Name
DOB and Social:	DOB and Social:

Address:	Email Address:
Telephone or Cell Numbers: _____ and _____	
TurboTax User ID (If Applicable): _____	TurboTax Password: _____

- Do you owe federal and/or state taxes; student loans, or any other judgments: amounts for each?
- Are you planning to purchase a home this year or in the near future?
- I require consultation during the year I understand that this is an additional \$25 fee.

(Please write the name how it appears on the social security card)

Dependent names	Relationship	DOB	SS#

Child Care Provider
Name _____ Social or EIN: _____
Address: _____ and Amount: _____

Information to Know: TurboTax charges an electronic fee for filing (in most cases it is taken from your returns) you may opt for mailing in your return. Fees are paid upfront no exceptions. Failure to pay little or no Federal or State Taxes may increase preparation cost.

Please attach the following (if applicable)

- **New Clients:** Have a copy of your last year's returns or adjusted gross income
- W2 for or other sources of income
- Expenses related to your car, uniforms, education, travel, health, insurance - including housing and the like
- Bank Name _____
- Bank Account Number: _____
- Bank Routing Number: _____
- **Expenses related to mortgage, taxes paid on your home or property, business cost - equipment, start up, meals, uniforms, amounts made for the year, and donations to nonprofit**

For Information please call: (202) 709-2383 Fax: (202) 204-5210
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