

# Joyce Pike Sparks, EA

## Client Drop Off Information

E-file return? YES / NO

Direct Deposit refunds? YES / NO

Name: \_\_\_\_\_

Current Address: \_\_\_\_\_

\_\_\_\_\_

E-Mail: \_\_\_\_\_

Day Phone: _____	<u>Release Instructions:</u> PICK-UP      or      MAIL
Evening Phone: _____	
Cell Phone: _____	

<b>Office use only:</b>	Date/Initials
Dropped-off	_____
Start Return	_____
Finish Return	_____
Check Return	_____
Scan Return	_____
Notified Ready	_____
Released Return	_____

Are you a NEW or RETURNING client? \_\_\_\_\_ NEW clients: We will need a copy of last year's tax returns filed

If you are a NEW client, how did you heard about us? \_\_\_\_\_

**Do you have a FAFSA deadline to meet?** YES / NO      **What is that date?** \_\_\_\_\_

## Family Member Information

	<u>Name</u>	<u>Birth date</u>	<u>SSN/TIN</u>	<u># months lived w/you during yr</u>
Taxpayer	_____	_____	_____	_____
Spouse	_____	_____	_____	_____
Dependent 1	_____	_____	_____	_____
Dependent 2	_____	_____	_____	_____
Dependent 3	_____	_____	_____	_____
Dependent 4	_____	_____	_____	_____

(Additional dependents may be listed on back of this form)

## Please answer the following questions

### If yes, .....

Can you or your spouse be claimed as a dependent on anyone else's return?	YES / NO	Which one can be claimed by someone else? _____
Have you added any NEW dependents this year?	YES / NO	Provide copies of social security cards
Did you have child-care expenses?	YES / NO	Provide Name, address, and EIN of provider
Child's name(s) provided for: _____		_____
Did you or your spouse have W-2 wages?	YES / NO	Provide original copies of all employer W-2 forms
Did you have education expenses?	YES / NO	Provide 1099-T from qualified institution
Did you pay any Student Loan Interest	YES / NO	Provide the 1098-E from the Lender
Did you make estimated tax payments?	YES / NO	List dates and amounts for Federal and State on back of form
Did you have any interest income?	YES / NO	Provide copies of 1099-INT or list on back of form
Did you have any dividend income?	YES / NO	Provide copies of 1099-DIV or list on back of form
Did you cash-in or roll-over any IRA or other retirement plans?	YES / NO	Provide copies of 1099-R for each account affected
Did you have any real estate foreclosed on, or have any cancellations of debt?	YES / NO	Provide copies of 1099-A or 1099-C you received
Did you sell any stocks?	YES / NO	Provide copies of 1099-S and cost basis (purchase price)
Did you buy or sell any real estate?	YES / NO	Provide copies of settlement statements from purchase and/or sale
Do you own rental properties?	YES / NO	Provide income and expenses related to the rental properties
Were you self-employed?	YES / NO	Provide business related income and expenses and business-related mileage for vehicles used in business
Did you receive any 1099-MISC forms?	YES / NO	Provide copies of 1099-MISC you received
If self-employed, did you pay for health insurance?	YES / NO	Provide total amounts paid

## Schedule A Itemized Deductions

Did you have long-term care or health insurance premiums?	YES / NO	Provide total amounts paid
Did you have medical/dental expenses not paid by insurance?	YES / NO	Provide total amounts paid
Do you own a home?	YES / NO	Provide copies of 1098 mortgage interest and real estate taxes paid
Did you pay any personal property taxes?	YES / NO	Provide amounts paid, include vehicle tags
Did you make any charitable donations?	YES / NO	Provide amounts paid and name of qualified organizations
Did you donate household items to charity?	YES / NO	Provide description of items and name of qualified organizations

Any other information we should know about?