

DATE: _____

+ACCOUNTING PLUS+
PERSONAL INCOME TAX CHECKLIST

A+: _____

NAMES: _____

PHONE: _____

ALT. PHONE: _____

ADDRESS: _____

TAXPAYER DOB: _____

SPOUSE DOB: _____

TAXPAYER SS#: _____

SPOUSE SS#: _____

QUESTIONS FOR SSM:

WHAT STATE WERE YOU MARRIED IN? _____

DEPENDENTS YOU CAN CLAIM THIS YEAR – FILL IN COLLEGE LEVEL

| FULL NAME | SS# | DOB | STUDENT/LEVEL |
|-----------|-----|-----|---------------|
| | | | |
| | | | |
| | | | |

| FULL NAME | SS# | DOB | STUDENT/LEVEL |
|-----------|-----|-----|---------------|
| | | | |
| | | | |
| | | | |

| FULL NAME | SS# | DOB | STUDENT/LEVEL |
|-----------|-----|-----|---------------|
| | | | |
| | | | |
| | | | |

DID YOU MOVE

HAVE YOU MOVED IN THE LAST YEAR? IF SO, PLEASE PROVIDE THE FOLLOWING:

OLD ADDRESS: _____

EXACT MOVE DATE: _____

DID YOU RECEIVE SOCIAL SECURITY (WE NEED THE PINK/WHITE STATEMENT)!!!!!!

REFUND INFORMATION

MAILED: _____

DIRECT DEPOSIT:

BANK NAME: _____

ROUTING #: _____

ACCOUNT #: _____

BE SURE WE HAVE THE DOB ON ALL PERSONS!!!! ENTERED ON FRONT!

QUESTIONS:

DO YOU HAVE ANY FOREIGN BANK – FINANCIAL ACCOUNTS? Y____N____
EXCEPTION: MUTUAL FUNDS HELD BY U.S. COMPANY

DID YOU HAVE ANY STOCK SALES OUTSIDE AN IRA? Y____N____
DO WE HAVE THE COST BASIS AND SALES PRICE ON EACH?

IS YOUR HSA ACCOUNT A SINGLE OR FAMILY PLAN? S____F____

DID YOU MAKE A ROTH CONTRIBUTION? Y____N____

DID YOU RECEIVE A ROTH DISTRIBUTION, IF SO HOW LONG HAVE
YOU HAD THE ROTH IRA? _____ YEARS. y____N____

EIC ADDITIONAL QUESTIONS

WHO LIVES IN YOUR HOUSEHOLD? _____

INCOME OF EACH _____

UTILITIES ARE IN WHOSE NAME? _____

RENTAL LEASE IN WHOSE NAME? _____

DID YOU PAY ANY TAX ESTIMATES - LIST DATES AND AMOUNTS

| <u>DATE</u> | <u>FEDERAL</u> | <u>STATE</u> | <u>SCHOOL</u> | <u>CITY</u> |
|-------------|----------------|--------------|---------------|-------------|
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |

HAVE THERE BEEN ANY OTHER CHANGES SINCE LAST YEAR? IF SO, PLEASE NOTE THEM HERE:

