

INCOME TAXES WORKSHEET 2018

Date

CHARGE

New Client

YES / NO

Single / Married, Separate / Married / Head of Household

Telephone

PROFESSION

DOB

Client's Name

H

Client's S.S.#

W

Was there a change in dependents or marital status in 2016?

Address change in 2017?

DEPENDENTS:

,= Y if lives with taxpayer - N - if not

E.Mail address -

Disabled - = D (Proof)

School Teacher?

Alimony pd, r'cvd?

Any educational expenses?

(1), (2), (3), (4) or Grad Sch

Energy improvements to primary home?

Hybrid vehicle purchased, if so, make of vehicle and date?

Name's

DEPENDENTS

S.S. #

DOB

For ECI : Proof that dependents lived at same house (Doctor, School or Soc sec 1099)

Child Care (Baby Sitter)

EIN

Name

Address

Rent For Year

\$

Landlord's

Name

Address

FOR

ROUTING

ACCOUNT NUMBER

BANK NAME

SAVINGS OR

DIRECT DEPOSIT

Rt#	Acc#
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CHECKING

DO YOU HAVE ANY FOREIGN ACCOUNTS?

Yes / No

Drivers Licenses:

#

Issue Date:

Expiration Date:

#

Issue Date:

Expiration Date:

I Declare that all the information given to the tax preparer is correct to the best of my knowledge.

A informacao que foi entregue ao preparador dos taxes esta correcta.

Health Ins

Yes No

If No

Employer

Offer

Yes No

PLEASE SIGN & DATE

HOME RELATED

	<u>/ OTHER</u>	<u>Business A</u>	<u>Business B</u>	<u>Rental A</u>	<u>Rental B</u>	<u>Rental C</u>
INCOME						
INCOME (FLOOR 1)						
INCOME (FLOOR 2)						
INCOME (FLOOR 3)						
INTEREST INCOME		INT INC.		INT INC.		
LOTTERY WINNINGS		FED W/H		STATE W/H		
LOTTERY EXPENSES						
UNEMPLOYMENT (OTHER)		FED W/H		STATE W/H		
EXPENSES						
COST OF SALES-PURCHASES						
ADVERTISING						
AUTO						
CLEANING						
EQUIPMENT RENTAL						
HEALTH INSURANCE				POLICY #		
INSURANCE						
LEGAL & PROF.						
MORT. INT. BANK 1						
MORT. INT. BANK 2						
PMI / MORT. INT. BANK 3						
STUDENT LOAN INTEREST						
REPAIRS						
SNOW REMOVAL						
SUPPLIES						
TAXES - EXCISE						
TAXES - REAL ESTATE						
TAXES - SALES TAX						
UNIFORMS / BOOTS						
UNION DUES						
UTILITIES						
SEWER						
GAS						
ELECTRICITY						
WATER						
DONATIONS						
OTHER EXPENSE _____						
OTHER EXPENSE _____						
OTHER ITEMS						
BOOKS FOR COURSES						
ENERGY EFF. SOLAR HEAT						
LEAD PAINT						
SEPTIC SYSTEM						
TUITION PAID						
OTHER _____						
				TOTAL MILEAGE _____		
				BUSINESS MILES _____		
				CUMMUTE MILEAGE _____		