

**I. TAXPAYER/SPOUSE INFORMATION**

**FULL NAME** (as shown on social security card): \_\_\_\_\_

Social security Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Date of Birth: MM \_\_\_\_ DD \_\_\_\_ YEAR \_\_\_\_\_

Occupation: \_\_\_\_\_ Do you want to contribute to the Presidential Campaign: \_\_\_\_\_

**SPOUSE FULL NAME** (as shown on social security card): \_\_\_\_\_

Social Security Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Date of Birth: MM \_\_\_\_ DD \_\_\_\_ YEAR \_\_\_\_\_

Occupation: \_\_\_\_\_ Do you want to contribute to the Presidential Campaign: \_\_\_\_\_

**MARITAL/FILING STATUS** (circle one): *Single*      *Head of Household*      *Married filing Joint*  
*Married filing Separate*      *Widow(er)*

**STREET ADDRESS:** \_\_\_\_\_

**CITY** \_\_\_\_\_ **STATE** \_\_\_\_\_ **ZIP** \_\_\_\_\_

Daytime Phone Number: (      ) \_\_\_\_\_ - \_\_\_\_\_ How late may we contact you? \_\_\_\_\_

Evening Phone Number: (      ) \_\_\_\_\_ - \_\_\_\_\_ How late may we contact you? \_\_\_\_\_

E-mail address: \_\_\_\_\_

*Who may we thank for referring you to ITAO/Bizness Lab?* \_\_\_\_\_

**EXEMPTIONS** Please complete the following as applicable:

	Name (as shown on SS Card)	Date of Birth	Social Security Number	Relationship to taxpayer	Months in home
<b>Dependant</b>					
<b>Dependant</b>					
<b>Dependant</b>					
<b>Dependant</b>					
<b>Dependant</b>					

**II. REFUND**

If you are receiving a refund tell us how you would like to receive the refund. (check only one)

- \_\_\_\_ IRS E-File Direct Deposit to your account (7-21 days – fees paid up front)
- \_\_\_\_ IRS E-File Check in mail (approx. 3-4 weeks – fees paid up front)
- \_\_\_\_ Bonu\$ Check (7-21 business days – fees deducted from refund)
- \_\_\_\_ Bonu\$ Deposit (7-21 business days DIRECT DEPOSIT to your account- fees deducted from refund)
- \_\_\_\_ Bonu\$ Visa Card (7-21 business days - Funds Deposited to card- fees deducted from refund)
- \_\_\_\_ I'd prefer to make that decision when I know my refund amount.

**III. SIGNATURE**

**ALL INFORMATION I HAVE GIVEN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE**

**IF I CHOOSE NOT TO COMPLETE THE RETURN, UPON TAX INFORMATION BEING INPUT INTO THE COMPUTER BY A TAX PREPAREER THERE WILL BE A \$30.00 CONSULTATION FEE.**

**Signature:** \_\_\_\_\_ **Date** \_\_\_\_\_

**Signature:** \_\_\_\_\_ **Date** \_\_\_\_\_

**Did you live in any other states?** YES NO

**Did you work in any other states?** YES NO

**List the states and the dates you lived there**

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<b>Did you or your spouse at any time during the year:</b>	<b>Circle</b>	<b>If yes, please provide:</b>
Receive wages, salaries, or any other employer compensation? Have you received W-2 forms from All employers?	YES NO YES NO	All W-2 forms
Receive unemployment compensation?	YES NO	All 1099-G forms
Receive Social Security benefits?	YES NO	All 1099-SSA forms
Receive alimony? If yes, list amount _____	YES NO	
Pay alimony? If yes, list name of recipient _____ SSN of recipient _____ and amount _____	YES NO	
Do you pay Daycare expenses? If yes, list amount _____ and SSN _____	YES NO	Provider name and address
Receive winnings from gambling? (lottery, race track, casinos, raffles)	YES NO	All W2-G forms
Receive any miscellaneous income? (prizes, awards, jury duty) If yes, list amount _____ and describe _____	YES NO	
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Are you claimed as a dependent on someone else's tax return?	YES NO	
Pay interest on student loans?	YES NO	
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Receive pension, annuity, IRA, or retirement income?	YES NO	All 1099-R forms
Receive interest on savings, cash, US bonds, stock dividends?	YES NO	All 1099-INT
Do you have any of the following?	YES NO	
Home mortgage?	YES NO	All 1098 forms
Medical expenses or pay for health insurance?	YES NO	List with amounts
Contributions to charity, church, etc.?	YES NO	List with amounts
Out-of-pocket expenses or use you personal vehicle on the job?	YES NO	List with amounts
Loss from casualty (fire, theft, natural disaster)	YES NO	List with amounts
Did you have a job related move?	YES NO	
Contribute to an IRA, SEP, Keogh or Simple Retirement Plan?	YES NO	
Pay college tuition expenses?	YES NO	
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Sell stock, mutual fund, or other securities?	YES NO	All 1099-B forms
Receive a 1099-MISC?	YES NO	All 1099-MISC
Own you own business or were you self-employed?	YES NO	
Did you receive tips from your self-employed business? YES NO		
Use a portion of your home exclusively for business?	YES NO	
Do you own rental property?	YES NO	
Receive royalties?	YES NO	
Sell your home?	YES NO	All 1099-S forms
Sell any other property (equipment, land, etc.)?	YES NO	
Did you make estimated tax payments?	YES NO	
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Operate a farm?	YES NO	
Receive installment payments on property sold?	YES NO	
Have an interest in partnership, S-corporation, estate or trust?	YES NO	All K-1 forms
Have income as a minister?	YES NO	