

CLIENT PROFILE

	PRIMARY	SPOUSE
Full Name	_____	_____
Occupation	_____	_____
Soc Sec #	_____	_____
DOB	_____	_____
Home Phone	_____	_____
Mobile Phone	_____	_____
Work Phone	_____	_____
Fax #	_____	_____
Email	_____	_____

Current Street Address _____

City _____ ST _____ Zip _____

County _____

Have you moved since your last tax return? Yes No Date of Move _____

DEPENDENTS		
Legal Name	DOB	Soc Sec #
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Signature _____ Date _____

INCOME**Check All That Apply and Bring Statements**

	Wages, Sick Pay, Etc.
	Interest & Dividends
	Alimony Received
	Unemployment Compensation
	Social Security
	Lottery / Gambling Winnings

	Pension & IRA Withdrawals
	Rental Income & Expenses
	Farm Income & Expenses
	Self-Employment Income & Expenses
	Sale of Stock, Land, Etc.
	Other Income (List Source & Amount)

ITEMIZED DEDUCTIONS

MEDICAL & DENTAL	Husband	Wife	GIFTS to CHARITY	Husband	Wife
Health Ins Premiums	\$	\$	(Attach Receipts)	\$	\$
Prescription & Medicine	\$	\$	Total Gifts by Cash or Check	\$	\$
HSA Distributions- BRING	\$	\$	Charitable Miles	\$	\$
STATEMENT-1099SA	\$	\$	Other than by Cash or Check	\$	\$
Dental Expenses	\$	\$			
Long-Term Care Ins Prems	\$	\$			

TAXES YOU PAID	Husband	Wife	JOB EXPENSES (List)	Husband	Wife
State & Local Taxes	\$	\$	Do you get a car allowance- BRING	\$	\$
Real Estate Tax	\$	\$	* Parking	\$	\$
Personal Property Tax	\$	\$	* Business Miles	\$	\$

MORTGAGES	Husband	Wife	ANY SIDE HUSTLES/JOBS	Husband	Wife
Mortgage Interest	\$	\$	Do you get a car allowance- BRING	\$	\$

DEDUCTIONS & CREDITS: (Check all that apply)	Husband	Wife
Teaching Supplies (K-12 Teachers Only)	\$	\$
IRA Contributions <input type="checkbox"/> Roth <input type="checkbox"/> Traditional	\$	\$
Alimony Paid	\$	\$
Recipient's Name: _____ Soc Sec # _____		
Student Loan Interest	\$	\$
HSA Contributions (Bring Statements)	\$	\$
Self-Employed Health Ins Premiums	\$	\$
SEP, Simple & Other Pension Contributions	\$	\$
Child Care Expenses Babysitter's Name _____ Address _____ Soc Sec # _____ or Fed ID # _____	\$	\$
Investment Interest (Bring Statements)	\$	\$
Tuition / Fees / Educational Expenses (Bring Statements)	\$	\$