

Name of person who referred you: _____

His/Her Phone # _____

Your First Name: _____ Last _____

SSN/ ITIN Number: _____ Date of Birth ____ / ____ / ____

Spouse First Name: _____ Last _____

SSN/ ITIN Number: _____ Date of Birth ____ / ____ / ____

Your Occupation: _____ Spouse (if any) _____

Current Address: _____

Phone (Cell): _____ (H) _____

E-mail: _____

Do you have full year Insurance? Yes () No () If no explain _____

1. First Name: _____ Last Name: _____ SSN/ITIN Number: _____ D/B _____ Relationship _____	Dependents Information
2. First Name: _____ Last Name: _____ SSN/ITIN Number: _____ D/B _____ Relationship _____	
3. First Name: _____ Last Name: _____ SSN/ITIN Number: _____ D/B _____ Relationship _____	

Bank Routing #: _____ or attach void check. Account Number: _____ () Savings () Checking	Direct Deposit
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For Your Tax Filing — Prepare the Following Applicable Documents

INCOME

- W-2 & Interest Income Forms for the year 2017
- Dividend and any foreign interest income
- Unemployment Compensation: Form 1099-G
- Miscellaneous income : Form 1099-MISC
- Trading: Ticker Symbol, Purchase Date & Price, Sales Date and Price.
- Partnership, S Corporation, & Trust Income: Sch. K-1
- Pension and Annuities: Form 1099-R
- Social Security Benefits: Form RRB-1099
- Gambling and Lottery Winning (W-2G)

EXPENSES

- Mortgage interest statement (Form 1098S)
- Student loan interest (Form 1098E)
- Real estate tax paid
- Moving expenses
- Gifts to charity (cash, or any other type of donations)
- Medical & dental expenses.
- Job-related educational expenses.
- Child care expenses.
- Unreimbursed expense related to your job (travel ex., uniforms, union dues, subscriptions etc.)
- Settlement papers if you purchased, sold or refinanced your house in 2017.
- Tuition payment records to claiming tuition tax credit (Form 1098T)
- IRA contribution.

Important Reminders

STATE ID

Some states either require or request a driver's license number or other state identification to be included with the e-filing of state returns:

At this time, only [Alabama](#), [Ohio](#) and [New York](#) are requiring the driver's license for electronically filing. California, Kansas, Louisiana, New Jersey, Pennsylvania, Virginia and Wisconsin, are requesting (but not requiring) the information. State policies are constantly changing.

ITIN

Your ITIN may expire before you file a tax return in 2018. All ITINs not used on a federal tax return at least once in the last three years will expire on December 31, 2017. Additionally, all ITINs issued before 2013 with middle digits of **70, 71, 72 or 80** (Example: 9XX-70-XXXX) will expire at the end of the year.

If you need to file a tax return in 2018, IRS recommends you submit a [Form W-7, Application for IRS Individual Taxpayer Identification Number](#), now to renew your ITIN. As a reminder, ITINs with middle digits 78 and 79 that expired in 2016 can also be renewed.