

Taxpayer Personal Data Summary

Your Name: _____ SSN: _____ DOB: _____
Spouse's Name: _____ SSN: _____ DOB: _____
Address: _____
City: _____ State & Zip Code: _____
E-Mail Address _____
Telephone Number: _____ Telephone Number: _____

Marital Status (circle one): Never Married Divorced Widow(er) Married

Your Driver's License Number: _____ Issue Date: _____ Expiration Date: _____
Spouse's Driver's License Number: _____ Issue Date: _____ Expiration Date: _____

Dependent's Information:

Name: _____ Name: _____
SSN: _____ SSN: _____
DOB: _____ DOB: _____
Relationship: _____ Relationship: _____

Name: _____ Name: _____
SSN: _____ SSN: _____
DOB: _____ DOB: _____
Relationship: _____ Relationship: _____

Please be sure you also bring the following items:

W2
Interest income from checking or savings account(s)
Dividend income
State & local income tax refunds - 1099-G
Alimony received (if divorce was finalized before 12/31/18)
Hobby income & expenses
Misc income - 1099
Retirement income - 1099-R
Unemployment compensation - 1099-G
Social Security benefits
RR1 benefits
Gambling & lottery winnings
Partnership Income (Schedule K-1)
Misc income

State and local income taxes you paid last year (on last year's return)
Educator Expenses
Penalties paid for early withdrawal of savings / CD account(s)
Alimony paid (*don't forget to obtain SSN (if finalized before 12/31/18)*)
IRA contributions or contributions made to other retirement plans
Student loan interest paid
Tuition & school fees (taxpayer, spouse, & all dependents)
Child care expenses
Adoption expenses
HSA Contributions & Disbursements
Information for all Stocks sold during the year -- purchase price, date purchased, number of shares purchased, date sold, sale price, etc...

You may download spreadsheets from our website to help with the following items:

Itemized & misc deductions
Small business income & expenses
Rental income & expenses
Office In Home expenses