



7504 NW 58TH Court; Tamarac, FL 33321

Tel: (954)993-2324 Fax: (866)707-9811

INCOME TAX INFORMATION SHEET

Taxpayer Information:

First Name _____ Middle _____ Last Name _____

Social Security _____ Date of Birth _____ Occupation _____

Spouse Information:

First Name _____ Middle _____ Last Name _____

Social Security _____ Date of Birth _____

Address _____

City _____ State _____ Zip Code _____

Phone _____ Email Address _____

Dependents Information:

Name	Date of Birth	Social Security	Relationship	US Citizen Or Resident

Income Information

- Wages or Salaries (W2 for all jobs)
- Disability Income
- Interest / Dividends (1099-INT)
- Interest on Insurance Proceeds
- Capital Gain Distributions, Capital Losses (1099-DIV)
- State Tax Refund
- Alimony
- Tip Income
- Scholarship and Fellowship (W2)
- Pension and IRA Distribution
- Unemployment (1099-G)
- Social Security (1099-SSA)
- Unreported Social Security and Medicare Tax
- Self-Employment, Income Business (1099-MISC)
- Sale of Business Property
- Rents, Royalties, Partnerships, S Corporations, Estate and Trusts
- Other Income such as gambling, prizes, lottery

Expenses Information

- Medical Expenses (health insurance type: marketplace, Medicaid, employer)(Form 1095A,1095B or 1095C)
- Taxes you paid State and Local
- Real Estate Taxes
- Home Mortgage Payments (1098-INT)
- Charitable Contributions
- Casualty and Theft Losses
- Unreimbursed Job Expenses
- Tax Preparation
- Other Expenses, Investment, Safe Deposit Box
- Education Expenses (1098-T)
- Child Care Expenses

Bank Information

Bank Name _____

Routing Number _____ Account Number _____