



BRING ALL OFFICIAL DOCUMENTS
NEW CLIENTS: BRING COPY OF
2019 TAX RETURN

- W-2 Statements
- 1099 Interest
- 1099 Dividends
- Home Purchase/Sale Documents (Purchase Agreement, Settlement Statement or HUD-1)
- Home Mortgage Refinance Documents
- 1099 Social Security Income
- 1099 Pension/Annuity Disbursement
- 1099 IRA/Keogh Withdrawal/Rollover
- All IRA Year-End Statements
- 1099 Unemployment Income
- 1099 State Tax Refund
- Stock Sales - Purchase and Sale Info
- 1099 Broker Statement
- 1099 Miscellaneous Commissions
- 1099 Prizes, Gambling Income
- 1099 Debt Forgiveness
- Rents
- Agricultural Payments
- K-1's from S-Corps, Partnerships
- K-1's from Estates, Trusts
- Alimony
- Jury Duty

**BRING VOIDED CHECK FOR
DIRECT DEPOSIT OF REFUND**

BUSINESS

- Furnish Income & Expense detail separately or call for a special worksheet if any of the following apply:
- Business - Self Employed
 - Farm
 - Rentals

EDUCATION EXPENSES

- Tuition \$ _____
- Fees \$ _____
- Books \$ _____
- Living Expenses \$ _____
- School Year (1,2,3,4) _____

ENERGY CREDIT

- Heating/Cooling \$ _____
- Roof, Windows \$ _____
- Solar/Wind \$ _____

PERSONAL DATA

*This section for **new clients only**, or for **changes** to prior-year information*

Last Name	Phone	Taxpayer	Spouse
	Home		
	Office		
	Mobile		
Email (taxpayer)		Email (spouse)	
First Name & Initial (taxpayer)		First Name & Initial (spouse)	
Occupation		Occupation	
Social Security No.		Social Security No.	
Birthdate (req'd)		Birthdate (req'd)	
Mailing Address		County	School District
City		State	ZIP Code

DEPENDENTS

Name First, Initial & Last (if different)	Date of Birth (required for Child Tax Credit)	Social Security No.	Relationship	# month s lived in your home	"X" if not living with you
	/ /				
	/ /				
	/ /				
	/ /				

ESTIMATED TAXES PAID

Please have cancelled checks available

	Date Due	Date Paid	Federal	Date Paid	State
Fourth Quarter Prior Year	Jan. 2018	/ /	\$	/ /	\$
First Quarter	Apr. 2018	/ /	\$	/ /	\$
Second Quarter	Jun. 2018	/ /	\$	/ /	\$
Third Quarter	Sep. 2018	/ /	\$	/ /	\$
Fourth Quarter	Dec. 2018 Jan. 2019	/ /	\$	/ /	\$



ITEMIZED DEDUCTIONS

MEDICAL EXPENSES	
Generally must exceed 7.5% of Income for Federal & Most States	
Prescription drugs (no "over-the-counter" drugs)	
Doctors/Dentists/Hospitals/Glasses	
Hospital & nursing home	
Medical insurance premiums (paid out of pocket)	
Long Term Health Care insurance premiums	
Insurance reimbursements (only for the above amounts)	
Auto travel (for medical purposes)	miles
1095-A, 1095- B, 1095-C, or Proof of Health Insurance	
Other	

TAXES PAID	
Real Estate - Primary residence	
Real Estate - Second home	
Real Estate - Other (list)	
Auto License Fee - No trucks, boats, or motorcycles	1.
	2.
	3.
Sales Tax - Vehicle or homebuilding materials	

HOME MORTGAGE INTEREST PAID		
BRING YOUR 1098 FORM(S)	Primary Home	Second Home
<input type="checkbox"/> Paid to an Institution Institution Name:	Interest Paid	
	Points Paid	
<input type="checkbox"/> Paid to an Individual Name:	Address:	
	Social Security No.	
	Interest Paid	

CHILD OR DEPENDENT CARE		
Child or dependent care expenses allow you to work or attend school full time. Number of children under age 13:		
Name of Provider/Address	Soc Sec # or EIN	Amount Paid

STUDENT LOAN INTEREST - OTHER DEDUCT & CREDITS		
Bring statement(s) from lending agency - Form 1098-T		
Bring tuition paid statements from educational institution		
College Savings Iowa - 529 Plan Contributions		
Beneficiary Name		
Social Security No.		
Amount paid in:	\$	\$

CHARITABLE CONTRIBUTIONS	
Contributions by cash/check (attach summary if you need more room)	
Contributions by payroll deduction	
Travel for charitable purposes	miles
Value of goods contributed (usually fair market value)	
Name & address of recipient: (include detailed list of donated items when total is \$250 or more)	

MISCELLANEOUS BUSINESS & INVESTMENT EXPENSES NOT LISTED ELSEWHERE		
	Taxpayer	Spouse
Dues: union & professional		
Employment-related education/seminars		
Tuition/fees		
Books/publications		
Licenses, fees, credentials, etc.		
Tools, supplies, equipment		
Insurance - business (E&O, malpractice)		
Uniforms - purchased		
Uniforms - cleaned		
Business travel (explain)		
- Meals		
- Lodging		
- Other transportation		
- Reimbursement		
Job seeking expenses in same field		
- Employment & resume fees		
Investment management fees		
Safe deposit box		
Tax preparation & consulting fees		
IRA or Keogh (HR-10) fees paid by you		
Gambling losses - only to the amt of wins		
Tuition (K-12 only)		
Text books (K-12 only)		
Other:		
Move in/out of state? Date of move:		

The above stated information is correct and complete.

Signature _____

Date _____