

## Basic Information and Income

### Forms, Documents, etc to Bring In:

### Reported on:

Any changes or if you are new:

Name

Address

Single, Married or Head of Household

Phone #

Email address

Did you get married?

Spouse's name per Social Security Administration

Spouse's Date of Birth

Spouse's Social Security Number

Did you have any children this year?

Child's name

Child's Date of birth

Child's Social Security Number

Are you financially supporting anybody new?

Person's name

Person's relationship

Person's Date of Birth

Person's Social Security Number

Prior year's Tax Return if we didn't prepare it

Yours

Your spouse's

All my Wage Reports & Statements

W2s

All my spouse's Wage Reports and Statements

W2s

Interest Income

1099 - Int

Dividend Income

1099 - Div

Tax Refund Notice from your state (CA FTB)

1099 - G

Alimony Received

per your records

	<b>Forms, Documents, etc to Bring In:</b>	<b>Reported on:</b>
	Business Income & Expenses	per your records
	Capital Gains (the sale of stocks and other investments)	1099 - B
	IRS Distributions	1099 - R
	Pension Distributions	1099 - R
	Rental Income & Expenses	per your records
	Farm Income & Expenses	per your records
	Unemployment Compensation	1099 - G
	Social Security Benefits	SSA - 1099
	Railroad Retirement Board benefits	RRB - 1099
	Gambling Winnings	W2 G
	Other Income	per your records
	Cancellation of Debt	1099 - C
	Direct Deposit Information	
	Name of the bank	per your records
	Routing number	per your records
	Account number	per your records
	Type of account	per your records