

Debbie's Tax Facts

• 7232 Vinewood Lane N • Maple Grove, MN 55311 • (763) 420-5572 • FAX (763) 445-2195
• Email: debbiestaxfacts@gmail.com • Web Site: www.debbiestaxfacts.com

TAX CLIENT INFORMATION SHEET

I. TAXPAYER/SPOUSE INFORMATION

Primary Taxpayer Full Name (from social security card): _____

Social Security Number: _____ - _____ - _____ Date of Birth: MM ____ DD ____ YEAR _____

Occupation: _____ Do you want \$3 to go to the Presidential Campaign Fund: _____

SPOUSE FULL NAME (as shown on social security card): _____

Social Security Number: _____ - _____ - _____ Date of Birth: MM ____ DD ____ YEAR _____

Occupation: _____ Do you want \$3 to go to the Presidential Campaign Fund: _____

MARITAL STATUS (circle one): Single Married Separated

STREET ADDRESS: _____

CITY _____ STATE _____ ZIP _____

EMAIL ADDRESS: _____

Daytime Phone #: (____) _____ - _____ Drivers License # _____ Exp date _____ Issue date _____

Evening Phone #: (____) _____ - _____ SP Drivers License # _____ Exp date _____ Issue date _____

Closest living relative name _____ Phone _____

Who may we thank for referring you to Debbie's Tax Facts: _____

II. EXEMPTIONS

Please complete the following as applicable

	Name (As shown on social security card)	Date of Birth	Number	To Taxpayer	Months in Home
Dependent					
Dependent					
Dependent					
Dependent					
Dependent					

III. REFUND

If you are receiving a refund tell us how you would like to receive the refund. (Check only one)

____ Check in the Mail (approx. 3 weeks- fees paid up front)

____ I'd prefer to make that decision when I know the amount of my refund.

____ Direct Deposit to your account (9-15 days- fees paid up front)

Financial Institution: _____

Routing Number: _____ Account Number: _____

____ Checking or Savings (please circle only one)

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IV. ADDITIONAL INFORMATION

Did you or your spouse at any time during the year:

Circle: If yes, please provide

Did you live in any other states? NO YES

Did you work in any other states? NO YES

If yes, list the states and the dates you lived there:

Receive wages, salaries, or any other employer compensation? NO YES All W-2 forms
Have you received W-2 forms from ALL employers? NO YES
Receive unemployment compensation? NO YES All 1099-G forms
Receive Social Security Benefits? NO YES All 1099-SSA forms
Receive Alimony? NO YES
If yes, list amount _____
Pay alimony? NO YES
If yes, list name of recipient _____
SSN of recipient _____ Amount _____
Do you pay daycare expenses? NO YES Provider name &
Address _____

If yes, list amount _____ SSN _____
Receive winnings from gambling? (Lottery, racetrack, casinos, raffles) NO YES All W-2-G forms
Receive any miscellaneous income? (Prizes, awards, jury duty) NO YES
If yes, list amount _____
And describe _____
Are you claimed as a dependent on someone else's tax return? NO NO YES
Pay interest on student loans? NO YES

Receive pension, annuity, IRA or retirement income? NO YES All 1099-R forms
Receive interest on savings, cash, US bonds, stock dividends? NO YES All 1099-INT
Do you have any of the following?
Home Mortgage? NO YES All 1098 forms
Medical expenses or pay for health insurance? NO YES List with amounts
Contributions to charity, church, etc? NO YES List with amounts
Loss from casualty (fire, theft, natural disaster) NO YES List with amounts
Did you have a job related move? NO YES
Contribute to an IRA, SEP, Keogh, or simple retirement plan? NO YES
Pay college tuition expenses? NO YES

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Did you or your spouse at any time during the year:

Circle: If yes, please provide

Sell stock, mutual fund, or other securities?		NO	YES	All 1099-B forms
Receive a 1099-MISC?	NO	YES		All 1099-MISC
Own your own business or were self-employed?	NO	YES		
Use a portion of your home exclusively for business?		NO	YES	
Do you own rental property?	NO	YES		
Receive royalties?		NO	YES	
Sell your Home		NO	YES	All 1099-S forms
Sell any other property (equipment, land, etc.)?	NO	YES		
Did you make estimated tax payments?	NO	YES		

Operate a farm?		NO	YES	
Receive installment payments on property sold?		NO	YES	
Have an interest in a partnership, S-corporation, estate or trust?	NO	YES		All K1 forms
Have income as a minister?		NO	YES	

V. SIGNATURE

ALL INFORMATION I HAVE GIVEN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE

IF I CHOSE NOT TO COMPLETE THIS RETURN, UPON TAX INFORMATION BEING INPUT INTO THE COMPUTER BY A TAX PREPARER THERE WILL BE A \$ 50.00 CONSULTATION FEE.

SIGNATURE: _____ **Date:** _____