



DEMITRA ALEXANDER
MBA
CERTIFIED PUBLIC ACCOUNTANT

Income Tax Information Collection Form

Section I

	PERSONAL	
1	Filing Name\DOB\Occupation	
2	Filing status?	
3	Marital Status (can your spouse be claimed as a dependant on another return)	
4	Spouses Name\DOB\Occupation	
5	Dependants Name\DOB	
6	Are you claiming anyone as a dependant that is not your child?	
7	\$3 Presidential (filer and spouse)	
8	Address	
9	Did you buy or sell a personal residence this year?	
10	Have you lived in Texas the last 12 months	
11	Is anyone in the household disabled or legally blind?	

Section II

	DEPENDANTS	
12	Did your dependant live with you for the entire 12 months of the year?	
13	How much did your dependent Earn?	
14	Is your dependant a student?	
15	Can the taxpayer be claimed as a dependant on someone else's return?	
16	Did you adopt in the past 2 years?	
17	Do you have any custody orders for a dependant child?	

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Section III

	INCOME	
18	W2's for wages salaries or tips For each income source	
19	1099's (if applicable)	
20	Did anyone in your household receive UIB or SSI payments?	
21	Are you reporting Self-employment income?	
22	K1 forms for partnerships, S corps estate or trust	
23	Are you reporting any other income?	
24	Did you receive income from another state?	
25	How many different employers have you had this past year?	
26	What type of bank accounts do you have?	
27	CD or 401k, IRA, ROTH	
28	Did you withdraw funds from CD, 401k IRA ROTH	
29	Did you sell a home or are you collecting payments on a real estate transaction?	
30	Do you have any investment income?	
31	Did you pay or receive alimony?	

Section IV

	DEDUCTIONS	
32	Do you plan to itemize?	
33	Miscellaneous Deductions	
34	Are you participating flex saver?	
35	Do you own a home (1096 if yes)	
36	Mortgage interest statement for all mortgages?	
37	Did you refinance or sell a	

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	home/mortgage?	
38	Do you own more than one home? (1096 if yes)	
39	Did you receive a mortgage credit Certificate?	
40	Did you make any tax-deductible donations?	
41	Do you have any children in college?	
42	Is anyone in the household claiming educational expenses?	
43	Educational expenses?	
44	Do you have student loan interest that you want to claim from the past 5 years?	
45	Are you paying daycare expenses? Do you have statement from the Daycare provider?	
46	Did you claim EIC last year?	
47	Have you ever been denied or deemed ineligible to use EIC?	
48	Have you made any tax payments?	

Section V

	WRAP-UP	
49	Do you anticipate any major changes in your income during the next year?	
50	Copies of ID and SSN's for all	
51	Verification of DOBs for all	
52	Copy of Last years Return	
53	Copies of W2's & 1099's	
54	Address verification	
55	Contact Number	
56	Would you like to E-file	
57	Do you want direct deposit for your return? (Need routing number and account number Voided check is best)	
58	With you like to withhold your fee from your return?	
59	5 digit PIN for E-file for both you and your spouse?	

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