

Family TAX OFFICE

PERSONAL INFORMATION

If married filing separate fill out spouse's information.

TAXPAYER:

SPOUSE: () NONE

First Name _____
 Middle _____
 Last _____
 SSN _____-_____-_____
 Birth date _____
 Address _____
 City _____
 State _____ Zip _____
 Home Phone (_____) _____-_____
 Cell (_____) _____-_____
 Email _____
 Work (_____) _____-_____- Ext _____
 Ok to call _____
 Work Email _____
 OK to Email _____
 Occupation _____

First Name _____
 Middle _____
 Last _____
 SSN _____-_____-_____
 Birth date _____
 Address _____
 City _____
 State _____ Zip _____
 Home Phone (_____) _____-_____
 Cell (_____) _____-_____
 Email _____
 Work (_____) _____-_____- Ext _____
 Ok to call _____
 Work Email _____
 OK to Email _____
 Occupation _____

- () Student () Halftime () Fulltime
 () US Citizen () Resident Alien () Non resident Alien
 () Blind () Disabled
 () Widowed Date of Death

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 () US Citizen () Resident Alien () Non resident Alien
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 () Widowed Date of Death

I prefer to be contacted by () Home Phone
 () Cell Phone () Email () Text () Work Email () Any
 () I AM CLAIMING MYSELF
 () I AM BEING CLAIMED AS A DEPENDENT ON ANOTHER RETURN
 () I WOULD LIKE \$3 MOVED FROM THE GENERAL FUND INTO THE PRESIDENTIAL ELECTION FUND
 (Answering yes, does not affect my tax return)

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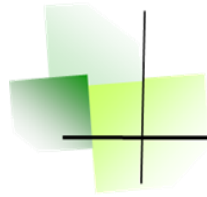
Drivers License/ID State of Issue _____
 Number _____
 Issue Date _____
 Expiration Date _____

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 Number _____
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Direct Deposit information (you can elect to deposit up to 3 separate accounts)

Bank Routing Number _____ Acct Number _____ () Checking () Savings

(760) 870-4441 text (858) 301-6100 office (760) 870-7770 fax
 14231 Garden Rd Suite 11 Poway Ca 92064
www.FamilyTaxOffice.com



Family TAX OFFICE

INCOME INFORMATION

- W-2 Employment Income
- Interest/dividends
- State Tax Refund form 1099G
- Alimony \$ _____ per Mo /Yr
- Self Employment
- Investments-Gains/Losses
- IRA distributions
- Retirement Pension
- Rental Income
- K-1 Partnership/Beneficiary/Shareholder
- Farm Income
- Unemployment
- Social Security Benefits
- 1099-misc
- Gambling Winnings
- Canceled Debt
- Unreported Tips
- Other _____

DEDUCTIONS

- Educator Expenses
- Health Savings Account Deduction
- Moving expenses
- Alimony Paid \$ _____ per Mo /Yr
- IRA deduction
- Student Loan Interest Paid
- Other _____
- I am dropping off my documents
- I will wait while my return is completed
- I have provided last year's tax return
- I am interested in providing my last 3 years tax returns along with documents for a complimentary accurate check

CREDITS

- Foreign Tax Credit
- Child Care Credit
- Education Credit
- Residential Energy Credits
- Other _____

TAXES

- First Time Home Buyer Repayment
- Household Employment Taxes

ITEMIZED DEDUCTIONS () NONE

- Medical and Dental Expenses
- Real Estate Taxes
- Personal Property Tax (DMV Fees)
- Mortgage Interest
- PMI's
- Points Paid/Carry Over
- Cash to Charity/Church
- Non Cash Goods Donated Value
- Casualty Theft or Losses
- Unreimbursed Work Related Expenses
- Tax Preparation Fee's
- Other Expenses _____
- I have carry back/carry over gains/losses

I understand that Family Tax Office will be preparing my income taxes with the information and documents that I have provided, kept private, confidential and secure. I am under no obligation to file my taxes with Family Tax Office. At anytime, I can request my original documents be returned to me.

_____ Date _____

Client Signature

If, filing a joint return, only one signature is required.

Received by _____ Date _____

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