

Referred By:

TAX DEPOT

Last Served:

DATE: _____

APPLICATION: INDIVIDUAL TAX PREPARATION

PRIMARY TAXPAYER:

 LAST NAME: FIRST NAME: MIDDLE INIT.: DOB: SOCIAL SECURITY#

 OCCUPATION

SPOUSE:

 LAST NAME: FIRST NAME: MIDDLE INIT.: DOB: SOCIAL SECURITY#

 OCCUPATION

ADDRESS:

 STREET NAME: CITY: STATE: ZIP: OWN HOME: Y N

CONTACT INFORMATION

 HOME PHONE: BUS. PHONE: CELL PHONE: EMAIL:

Drivers License

FILING STATUS	
Married: <input type="checkbox"/>	Single: <input type="checkbox"/>
Head of Household: <input type="checkbox"/>	
MFS* <input type="checkbox"/>	

PRIMARY	SPOUSE
Issue: _____	_____
No.: _____	_____
State: _____	_____
Expire: _____	_____

2008 FIRST TIME HOMEBUYER CREDIT

Did you purchase a home between (4/8-12/31/2008)?	
<input type="checkbox"/> Y	<input type="checkbox"/> N

DEPENDENT INFORMATION:

DEPENDENT NAME:	DOB:	SOCIAL SECURITY:	RELATIONSHIP:	COLLEGE STUDENT
_____	_____	_____	_____	Y <input type="checkbox"/> N <input type="checkbox"/>
_____	_____	_____	_____	Y <input type="checkbox"/> N <input type="checkbox"/>
_____	_____	_____	_____	Y <input type="checkbox"/> N <input type="checkbox"/>
_____	_____	_____	_____	Y <input type="checkbox"/> N <input type="checkbox"/>

MOTHER'S MAIDEN NAME

Taxpayer: _____
 Spouse: _____

College Name: _____
 College Name: _____

BANKING INFORMATION

Bank Name: _____
 Routing No.: _____
 Account No.: _____
 Account Type: _____

CHILD CARE PROVIDER SECTION

NAME: _____
 ADDRESS: _____
 EIN/SS#: _____
 TELEPHONE #: _____
 DEPENDENT NAME: _____
 AMT. PAID: _____

Please note that the purpose of this form is to gather information to be used to prepare your tax return. All information is implicitly protected and will not be used except for that purpose. Applicant, by the use of this form, gives Tax Depot permission to transmit the tax return to the IRS and/or EPS Financial.

Signature: _____

Phone: 770-641-8814
 Fax: 770-587-4339
 Email: tax-depot@mindspring.com



Individual Return Tax Checklist

Before gathering documents for your tax return, go through this checklist to help you save time and energy. Focus on the categories that apply to you and provide that information to Tax Depot for the completion of your tax return.

First-Time Clients

- Tax Depot Personal Tax Preparation Application Form
- If alimony paid, Ex-spouse's name, social security number & amount of alimony paid
- Photocopy of your, your spouse's, and you dependent(s)' social security cards
- Photocopy of your and your spouse's valid driver's license
- Copy of previous year's tax return (all forms & schedules)
- Previous Years' Tax Preparation Expense
- Voided check (for direct deposit purposes)

All Clients

- Tax Depot Individual Tax Preparation Application
- Photocopy of your, spouse's and dependent(s)' social security card
- Photocopy of a valid driver's license
- Employer Information**
- Wage Statements (W-2 Form)
- Income**
- Social Security Income (1099-SSA, RRB-1099 Form)
- Unemployment Income (1099-G Form)
- Retirement/Pension of 401K Income (1099-R Form)
- Interest & Dividend Income (1099-INT, 1099 OID, 1099-DIV Form)
- Sale of stocks, bonds, etc. Income (1099-B Form)
- Investments Income (Schedule K-1 1065, Schedule K-1, 1120-S Form)

Miscellaneous Income

- Gambling & Lottery Winnings Income (W-2G Form)
- Alimony Income
- Rental Property Income (1099-Misc Form)
- Other Miscellaneous Income
- Jury Duty Income
- Prizes & Awards Income (1099-Misc Form)
- Scholarships & Fellowships Income

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Itemized Deductions

- Un-reimbursed Employment Expenses
- Un-reimbursed Volunteer Expenses
- Charitable Contributions
- Home Mortgage Interest (1098 Form)
- Casualty & Theft Losses
- Employment Educational Expenses
- Employment Search Expenses
- Medical & Dental Expenses
- Investment Expenses
- Moving Expenses
- Childcare Expenses & Provider Information
 - Tax I.D. Number
 - Full Mailing Address
 - Telephone Number
- Adoption Costs
- Education Costs (1098 Form)
- Student Loan Interest (1098-E Form)
- IRA Contributions
- Medical Savings Account Contributions
- Property Tax
- Ad Valorem (Car Tag) Tax
- Refinanced Mortgage Settlement Statement



Business Return Tax Checklist

Before gathering documents for your tax return, go through this checklist to help you save time and energy. Focus on the categories that apply to you and provide that information to Tax Depot for the completion of your tax return.

First-Time Clients

- Tax Depot Business Tax Preparation Application Form
- Photocopy of your social security card
- Photocopy of your valid driver's license
- Copy of previous year's tax return (all forms & schedules)
- Previous Years' Tax Preparation Expense

All Clients

- Tax Depot Business Tax Preparation Application Form
- Bank Statements*
- Financial Statements
 - Balance Sheet
 - Income Statement
- Quicken® or Quickbooks® Backup
- Year-End Payroll Report
- List of assets purchased during year
 - Name of asset
 - Purchase date of asset
 - Cost of asset
- List of business expenses*

*Bank Statements are in lieu of financial statements, Quicken® or Quickbooks® Backup, and list of business expenses.

*List of business expenses are in lieu of financial statements, Quicken® or Quickbooks® Backup, and bank statements.

Income

- Income
- Rent Received
- Rental Property Purchase & Sales (Hud-1, 1099S Forms)

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Expenses

- Estimated Tax Paid (1040ES, 500ES Forms)
- Local Transportation/Travel Expenses
 - Public Transportation, Parking, Tolls Expense
 - Car Mileage
 - Airfare, Hotel, Meals, Tips, etc. Expense
- Legal & Professional Expenses
- Insurance Expenses
- Advertising Expenses
- Office Expenses (Rent, Internet, paper, pens, etc.)
 - Home Office
 - Square footage of home office
 - Square footage of home
 - Home Repairs, Mortgage Interest, Utilities
- Wages Paid
 - Employees' Wage Statements (W2, W3 Forms)
 - Contractors'/Subcontractors' Payments (1096, 1099-Misc Forms)

Rental Property

- Rental Property Settlement Statement (Hud-1 Forms)
- Mortgage Interest (1098 Form)
- Cleaning, Maintenance, Supplies & Repairs Expense
- Management & Utilities Expense
- Appraisal, Commissions, HOA & Condos expense
- Real Estate Tax
- County & City