SKALLY'S TAX SERVICE

Phone: 651-298-1188 skallystaxservice.com Fax: 651-228-1952

NEW CLIENTS – COMPLETE THIS SECTION

****PRIOR CLIENTS – COMPLETE THIS SECTION ONLY IF SOMETHING HAS CHANGED****

	Taxpayer	Spouse
Social Security Number		
First Name & Middle Initial		
Last Name		
Occupation		
Date of Birth		
Work or Cell Phone Number		
Home Phone Number		
Address		
City, State & Zip Code		
Email address		

DEPENDENT INFORMATION

****PRIOR CLIENTS – COMPLETE THIS SECTION ONLY IF SOMETHING HAS CHANGED****

Dependent's Name	Birth Date	Soc. Sec. Number	Relationship	Months lived in your home	College student?	Disabled?

- ☐ **Is there anyone living in your household who is not your spouse or dependent child?**
- ☐ **If you have children under age 24 with *unearned* income (i.e. interest, dividends, stock sales) in excess of $1900 we recommend that you have us do their tax return in conjunction with yours.**

WE NEED THE FOLLOWING INFORMATION TO COMPLETE YOUR TAX RETURNS

- ☐ **NEW CLIENT -** copy of last two year's returns and social security cards for you, spouse, and children
- ☐ **W2S and ALL 1099 FORMS -** interest, dividends, stock sales, property sales, and unemployment
- ☐ **1099R FORMS** for IRA/Pension/Annuity Income if you withdrew from your IRA – bring the values of all regular IRA accounts at the end of the year
- ☐ **SSA FORMS** – for Social Security benefits you received during 2010
- ☐ **W2G or 1099 – GAMBLING INCOME** - sent to you by the casino or other organizations
- ☐ **1099 FORMS** relating to any cancellation of debt or foreclosure
- ☐ **K-1 FORMS -** from Partnerships, LLCs, Estates, Trusts and Sub–S Corporations
- ☐ **IF YOU RECEIVED OR PAID SPOUSAL MAINTENANCE –** we need the amount received.If you paid - we need the recipient's name and social security number
- ☐ **CLOSING STATEMENTS** (HUD statement, settlement statement) **-** if you bought, sold, or refinanced a home or other real estate bring the closing statements
- ☐ **HEALTH SAVINGS ACCOUNT DISTRIBUTIONS–** bring distribution forms 1099-SA
- ☐ **NONTAXABLE INCOME –** amount of Workers Comp, Veterans Benefits, Welfare Benefits, Scholarships, Grants and any other income
- ☐ **MOVING EXPENSES –** if you moved 50 miles or more to a new job location – provide expenses paid for transportation, storage, travel, lodging
- ☐ **ADOPTION DURING 2010 –** expenses paid during 2010 and any employer provided benefit amount
- ☐ **ALTERNATIVE MOTOR VEHICLE / ELECTRIC VEHICLE –** date of purchase, model, year, cost
- ☐ **GOVERNMENT CORRESPONDENCE –**bring any notices from IRS or State that you received this past year