

TUCSON TAX PROS
Drop Off Information

| Taxpayer | Spouse |
|-------------------------------|-------------------------------|
| Name _____ | Name _____ |
| SS # ____ - ____ - _____ | SS # ____ - ____ - _____ |
| Occupation _____ | Occupation _____ |
| DOB __/__/__ Blind _____ | DOB __/__/__ Blind _____ |
| Home Phone _____ | Home Phone _____ |
| Work Phone _____ | Work Phone _____ |
| Cell Phone _____ | Cell Phone _____ |
| Best Time to Call _____ | Best Time to Call _____ |
| Email _____ | Email _____ |
| Present Address _____ | _____ |

Please include the following items in the attached envelope:

- 1) All Forms W-2 and all Forms 1099 and 1098 (1099 INT for Interest, 1099 DIV for dividends, 1099 B for sale of securities (stock), 1099R for annuities and pensions, IRA or other retirement plan withdrawals, 1099G for State Tax Refund or Unemployment received, SSA -1099 for Social Security, and 1099 Misc for commissions and fees, etc)
- 2) Copies of Returns (Schedules K-1) for partnerships, joint ventures, S corporations, estates or trusts
- 3) If you are a new client, provide copies of last year's tax return

Answer the following questions:

- 1) Did you run a small business? Yes No if yes, please include income & expense amounts
- 2) Did you earn an income from rental property? Yes No if yes, please include income & expense amounts
- 3) Are you able to claim any dependents? Yes No if yes, please complete the dependent items on PG 2 of this form
- 4) Did you receive the Stimulus check during 2008? If so, how much

Filing status: Single Married Filing Jointly Head of Household
 Surviving Widow (er) with dependent child
 Married Filing Separately (Please list)
Spouse's Name _____
Spouse's Social Security Number _____

In 2009 Only Married (date: __/__/__) Divorced (date: __/__/__)
 Spouse Died (date: __/__/__)

Dependents: Children living with you age 18 or younger. If 19-23 and attends school full time for at least five months during the year, place "S" after name.

1. _____ Birthdate __/__/__ Grade ____ SSN _____
2. _____ Birthdate __/__/__ Grade ____ SSN _____
3. _____ Birthdate __/__/__ Grade ____ SSN _____
4. _____ Birthdate __/__/__ Grade ____ SSN _____

Other Dependents: list any other person whom you think might qualify as your dependent:

1. _____ Birthdate __/__/__ SSN _____ Relationship _____
2. _____ Birthdate __/__/__ SSN _____ Relationship _____
3. _____ Birthdate __/__/__ SSN _____ Relationship _____

The following questions may affect your tax return:

1. Did you contribute to an IRA, Roth IRA or self-employed retirement plan for 2009?
Taxpayer \$ _____ Spouse \$ _____
2. Did you sell any stock, securities, real estate or other property in 2009?
3. Did you refinance your home mortgage during 2009?
4. Did you move at least 50 miles because of a job change?
5. During 2009, were there any changes to federal or state returns filed in prior years?
6. Did you reside in an area affected by a 2009 natural disaster?
7. Did you have a foreclosure, repossession or other cancellation of debt in 2009?
8. Did you receive a stimulus check for \$250?

