



**Personal Information**-please update if changed

<b>Name:</b>	<b>SS#</b>	<b>Birthdate:</b>
<b>Drivers License #</b>	<b>State:</b>	<b>Issue/Exp Date:</b>
<b>Spouse:</b>	<b>SS#</b>	<b>Birthdate:</b>
<b>Drivers License #</b>	<b>State:</b>	<b>Issue/Exp Date:</b>
<b>Address:</b>		

**Contact Information**-please update if changed

<b>Primary Phone:</b>	<b>2nd Phone:</b>
<b>E-Mail:</b>	<b>2nd E-Mail:</b>

<u>Dependent Information:</u>	<u>Date of Birth:</u>	<u>Social Security #</u>	<u>Relationship</u>	<u># of Mo.</u>	<u>Remove?</u>
<b>Name:</b>					( )
<b>Name:</b>					( )
<b>Name:</b>					( )

**(Y) (N)**

- ( ) ( ) Did any of your dependent children under 18 years of age have unearned income (interest, dividends, capital gains etc.) over \$1250?
- ( ) ( ) Did any non-child dependent have gross income over \$4700 ?

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**INCOME**-check all that apply

**(Y) (N)**

( ) ( )	W-2's from <u>all</u> employers?		\$	-
( ) ( )	Social Security received		\$	-
( ) ( )	IRA or Pension Distributor		\$	-
( ) ( )	Interest?		\$	-
( ) ( )	Dividends?		\$	-
( ) ( )	Sold Real Estate this year? Need closing statement (HUD-1) for each transaction			
( ) ( )	Sold stocks, bonds or mutual funds? Please			
( ) ( )	Unemployment received?		\$	-
( ) ( )	Disability income received?		\$	-
( ) ( )	Did you start a new business this year? Please use Schedule C tab			
( ) ( )	Rental property income? Please use Schedule E tab			
( ) ( )	Partnership, S Corporations, Trust Income?		\$	-
( ) ( )	Gambling Winnings?		\$	-
( ) ( )	Alimony Received?	\$ -	Divorce Date.....	<input type="text"/>
( ) ( )	Other Income:	\$ -	Source:	

- \* Please provide all 1099's and other official tax documents.
- \* Please provide year end IRA and 401k Account statements for tax planning and RMD calculations.
- \* Please provide year end brokerage account statements and/or balance sheet for tax planning & loss harvesting purposes.

