

Client Information - Income Tax Return Data - 2016

Your Name _____ Age _____

Spouse's Name _____ Age _____

Home Phone _____ Cell _____ Work _____

Please Circle which one we should call first to reach you

Your Occupation _____ Spouse's Occupation _____

Home Address _____ City _____ State _____ Zip _____

Email Address _____

Do you have Health Insurance Yes No

Company _____ Policy # _____ Effective Date _____

Who is covered by policy Self Spouse

Children _____

- Yes ___ No ___ Did any births, deaths, marriages, or divorces occur in your household last year?
Please provide details.
- Yes ___ No ___ Did you have a change of address in the last year? Please note that above.
- Yes ___ No ___ Is there a change in your dependents during this last year,
Please provide details.
- Yes ___ No ___ Do you dependent children have any earned income or income from investments?
Please provide details.
- Yes ___ No ___ Did you roll over any retirement money into new accounts last year?
- Yes ___ No ___ Did you purchase or refinanced your home in 2016? We'll need a copy of closing statement
- Yes ___ No ___ Did you pay any student loan interest? Is the loan in your name?
- Yes ___ No ___ Did you pay college tuition for yourself, spouse or dependent? If yes, need payments **and** 1098-T
- Yes ___ No ___ Did you receive any disability income or other nontaxable income?
- Yes ___ No ___ Did you make any contributions to your IRA, either traditional or ROTH?
- Yes ___ No ___ Did you use your car on the job (other than to and from work)?
- Yes ___ No ___ Was your home rented out or used for business?
- Yes ___ No ___ Did you receive any letters or notices from IRS or NJ during the year?
- Yes ___ No ___ Did you purchase a new vehicle this year? If so, we need sales tax paid.
- Yes ___ No ___ Have you lived, worked and/or owned property in more than your home state this year?
If yes, where : _____
- Yes ___ No ___ Were you notified by IRS that your identity was stolen?
- Yes ___ No ___ Did you or your spouse receive any unemployment benefits in 2016?

Are there any other changes or events in your life this past year that we should know:

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All taxpayers must complete this disclosure due to the possibility of a \$10,000 penalty (or greater) for not disclosing foreign transactions on their tax return. In addition, non reporting extends the statute of limitations.

Disclosure of Foreign Assets

Yes	No	
_____	_____	Did you own directly or with others any foreign stock or securities, financial instruments, foreign issued annuities or life insurance, foreign hedge or private equity funds? If so, What Country? _____ Estimated value at 12/31/16 _____ Complete Description _____
_____	_____	Did you have a retirement or deferred compensation plan or account in another country? If so, What Country? _____ Fair Market Value at 12/31/16 _____ Description of the asset _____
_____	_____	Do you have a bank/brokerage account or a custodial account in another country? If so, What Country? _____ Highest Value of account during the year: _____ Need Bank name, address, account number, name on account.
_____	_____	Do you have any other assets outside the US such as land? If so, what Country? _____ Description and estimated value of the assets _____ Address: _____
_____	_____	At any time during 2015, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? If so, what country? _____ Please note that you may have to file Form TD F900-22.1.
_____	_____	During 2016, did you receive a distribution from, or were you the granter of, or transferor to a foreign trust? If so, what country? _____

The above information is correct to the best of my knowledge.

Taxpayer signature _____

Spouse signature _____

Date _____