

Client Information - Income Tax Return Data - 2017

Your Name _____ Age _____

Spouse's Name _____ Age _____

Please Circle which one we should call first to reach you:

Home Phone _____ Cell _____ Work _____

Please Circle which is the best way to be contacted for future questions: Phone Email Mail

Your Occupation _____ Spouse's Occupation _____

Home Address _____ City/State _____ Zip _____

Email Address _____

Do you have Health Insurance? **Yes** _____ **No** _____

If so, Please Provide proof of coverage for all household members.

Yes ___ No ___ Did any births, deaths, marriages, or divorces occur in your household last year? If so, Please provide details: _____

Yes ___ No ___ Did you have a change of address in the last year? Please note new address above.

Yes ___ No ___ Is there a change in your dependents during this last year? If so, 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 2017? If so, we will need a copy of closing statement.

Yes ___ No ___ Did you pay any student loan interest? Is the loan in your name? Need Form 1098-E

Yes ___ No ___ Did you pay college tuition for yourself, spouse or dependent? If yes, need payments **and** 1098-T.

Yes ___ No ___ Did you or your spouse receive any unemployment benefits in 2017? If yes, Need 1099-G

Yes ___ No ___ Did you make any contributions to your traditional IRA or ROTH IRA?

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 ___ Were you notified by IRS that your identity was stolen?

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

Client Information - Income Tax Return Data - 2017

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 12/31/17:
Complete Description:
Did you have a retirement or deferred compensation plan or account in another country? If so, What Country?
Fair Market Value at 12/31/17:
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:
Please provide Bank name, Address, Account number and Names on the account.
Do you have any other assets outside the US such as land? If so, Country: Address:
Description & estimated value of the assets
At any time during 2017, 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? Please note: you may have to file Form TD F900-22.1 If so, what country?
During 2017, 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: X

Spouse signature: X

Date

Date