

Client Information - Income Tax Return Data - 2018

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 _____

Yes ___ No ___ Do you have health insurance? If so, please provide documentation.

Yes ___ No ___ In 2018, were you married, divorced, separated or widowed? If so please provide details and date:

Yes ___ No ___ Please tells us who lives at the above address:

Name _____	Age: _____	Relationship: _____
Name _____	Age: _____	Relationship: _____
Name _____	Age: _____	Relationship: _____
Name _____	Age: _____	Relationship: _____
Name _____	Age: _____	Relationship: _____

Yes ___ No ___ Do you have dependent children? If yes, please answer the following:

- Yes ___ No ___ Were you married and lived with your spouse the entire year?
- Yes ___ No ___ Were you single, divorced, or legally seperated for the last half of the year?
- Yes ___ No ___ Did your child live with you for at least half the year?
- Yes ___ No ___ Did you provide more than half the cost of maintaining a home where you and your child lived?
- Yes ___ No ___ If your child does not live with you, do you have a divorce agreement or other document that allows you to claim your child?

Please provide a copy of your child's birth certificate, if we don't already have one.

Please provide proof of residency for your child (ie: school or medical record)

Yes ___ No ___ Did you roll over any retirement money into new accounts last year?

Yes ___ No ___ Did you purchase or refinanced your home in 2018? If so, we will a need 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 2018? If yes, **Need 1099-G**

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

Yes ___ No ___ Did you trade in your vehicle in 2018 that you used on the job or for business?

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.

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 12/31/18:
Complete Description:
Did you have a retirement or deferred compensation plan or account in another country? If so, What Country?
Fair Market Value at 12/31/18:
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 2018, 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