

Fowler Accounting Services

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Tax
Deduction **finder** &
Problem Minimizer

PLEASE COMPLETE THIS QUESTIONNAIRE BEFORE YOUR APPOINTMENT

- Please **call** for your appointment.
- Please **mail** the completed questionnaire to this office before your appointment.
- Please **mail** the completed questionnaire to this office so your return can be prepared by correspondence.

OR

- Your appointment is scheduled for:

Day: _____

Date: _____

Time: _____

Please promptly notify this office if you are unable to keep this appointment. Thank You!


This booklet is designed by tax professionals to help you maximize your deductions and defend them in case of audit.


READ THIS FIRST


This booklet is designed to help you maximize your deductions and minimize problems in preparing and filing your tax return.

Please keep in mind that taxes can be very complicated and even though this booklet will accommodate most taxpayers' needs, if you have a special situation not covered, please list it under "Questions You May Have."

The **"ALERT ARROWS"** designate certain special conditions as follows:

 Indicates areas that need to be completed by new clients.

 Indicates areas that **MUST** be completed by new clients and only needs to be filled in by existing clients when the information has changed.

 The most important arrow of all, denotes areas where the IRS has concentrated their computer matching programs. If the information provided is incorrect, it may trigger a service center audit. Pay particular attention to any special instructions in areas with this arrow.

TAXPAYER INFORMATION

Your Name			
Social Security #		Birth Date	
Home Phone		Work Phone	
Occupation			
Spouse Name			
Social Security #		Birth Date	
Home Phone		Work Phone	
Occupation			

ADDRESS & STATUS

Street			
City		State	ZIP
Email			
Status Changes This Year	Dates	Status Changes This Year	Dates
<input type="checkbox"/> Married		<input type="checkbox"/> Dependent Deceased	
<input type="checkbox"/> Separated		<input type="checkbox"/> Sold Home	
<input type="checkbox"/> Divorced		Legally Blind	Filer <input type="checkbox"/> Spouse <input type="checkbox"/>
<input type="checkbox"/> Moved		<input type="checkbox"/> Filer	
<input type="checkbox"/> Spouse Deceased		<input type="checkbox"/> Spouse	



ESTIMATED TAXES PAID


Please provide cancelled checks if available.

	Date Due	Date Paid	Federal	State
Applied From Prior Year's Refund				
First Quarter	APRIL			
Second Quarter	JUNE			
Third Quarter	SEPT			
Fourth Quarter	THIS JAN			



SPECIAL INFORMATION

**** Must be reported even if NOT taxable unless TRANSFERRED**

	You	Spouse
Employer Pension Plan?	<input type="checkbox"/>	<input type="checkbox"/>
Conventional IRA, Keogh and SEP Plans:		
Contributions		
Withdrawals		
Rollovers** (1)		
Roth IRA: (1) If rolled from a conventional IRA to a Roth IRA, the rollover can be taxable.		
Contributions		
Withdrawals		
Rollovers** (1)		
State Tax Refund		
Social Security or Railroad Retirement		
 Alimony Received - Matched with Payer		
Tips Received		
Unemployment Received		
Gambling Winnings		
Foreign Bank Account (✓ if yes)	<input type="checkbox"/>	<input type="checkbox"/>
Do you wish to contribute a portion of your taxes to the Presidential Campaign Fund? (✓ if yes)	<input type="checkbox"/>	<input type="checkbox"/>
Other:		
Other:		
<input type="checkbox"/> ✓ If you incurred any adoption expenses this year? If so, enter amount		
Salaries, Pensions, & Misc Income	Provide W-2s and 1099s	
Partnership & Trust Income	Provide K-1s	
Student Loan Interest Paid		
Coverdell Educ. Savings Account Contribution		
<input type="checkbox"/> ✓ If you have been denied earned income credit by the IRS. If so, have you been re-certified? <input type="checkbox"/> Yes <input type="checkbox"/> No		
<input type="checkbox"/> ✓ If you bought, sold, or gifted real estate last year. If so, please call in advance to discuss what documents are required.		

REFUND DIRECT DEPOSIT

Complete for refund direct deposit.

Banking Routing Number:	<input type="text"/>
Account Number:	<input type="text"/>
Type:	<input type="checkbox"/> Checking <input type="checkbox"/> Savings

CHANGE ONLY

DEPENDENTS

Social Security #s are MANDATORY.

▼ ** C-Child, R-Relative, O-Other

IRS MATCH

First Name	Last Name (If Different)	Social Security# (Mandatory)	**	Months In Home (This Home)	Birth Date	If over the age of 18	
						Income	✓ If Student

IRS MATCH

INTEREST INCOME

IRS computer matches payer and amount. Always use payer name listed on 1099 even if not the original source.

LINE #	Name of Payer Please provide all forms 1099INT & 1099OID	Banks, Credit Union, Corporate, Bonds, etc.	Seller Financed Mortgages Name, address & SS# required	Direct U.S. Obligations Savings Bonds, T-Bills, etc. (State tax-free)	Home State Municipal Bonds (Generally tax-free)	Other State Municipal Bonds (Federal tax-free)
1						
2						
3						
4						
5						
6						
7						
8						
9	Name: SS#:			Payer Address:		
10	Name: SS#:			Payer Address:		
11	FORFEITED INTEREST (Early Withdrawals)			FEDERAL WITHHOLDING ON INT & DIV		

IRS MATCH

DIVIDEND INCOME

IRS computer matches payer and amount. Always use payer name listed on 1099 even if not the original source. Some institutions use substitute 1099s, and caution must be used in separating the various types of dividends.

LINE #	Name of Payer Please provide all forms 1099 DIV	Foreign Taxes Paid	Total Ordinary Dividends	Qualified Dividends	Total Capital Gains Dividends	Direct U.S. Obligations Savings Bonds, T-Bills, etc. (State tax-free)	Taxable to State only	Nontaxable State and Federal	Return of Capital
1									
2									
3									
4									
5									

IRS MATCH

STOCK & OTHER ASSET SALES

IRS matches gross proceeds from sale using the 1099B. Many brokerage houses use substitute forms. All transactions must be reported even if there is no profit. The IRS computer has the sales price but not cost.

LINE #	Description	Acquisition Date MM/DD/YR	Sales Date MM/DD/YR	Gross Proceeds From Sale (For stocks use net after commission)	Cost or Other Basis	Net Profit or Loss (Information only)
1						
2						
3						
4						
5						

