



- 1851 Pine Cove Court • Winston Salem, NC 27127 • 910-850-6361 •
- Email: drmnewell@thettconsulting.com • Web Site: www.thettconsulting.com

**Thank you for
choosing T & T
Consulting.**

**These documents are
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TAX CLIENT INFORMATION SHEET

I. TAXPAYER/SPOUSE INFORMATION

Primary Taxpayer Full Name (from social security card): _____

Social Security Number: ____ - ____ - ____ Date of Birth: MM ____ DD ____ YEAR ____

Occupation: _____ Do you want \$3 to go to the Presidential Campaign Fund: ____

SPOUSE FULL NAME (as shown on social security card): _____

Social Security Number: ____ - ____ - ____ Date of Birth: MM ____ DD ____ YEAR ____

Occupation: _____ Do you want \$3 to go to the Presidential Campaign Fund: ____

MARITAL STATUS (circle one): Single Married Separated

STREET ADDRESS: _____

CITY _____ STATE _____ ZIP _____

EMAIL ADDRESS: _____

Daytime Phone #: (____) _____ - _____ Driver's License # _____ Exp date _____ Issue date _____

Evening Phone #: (____) _____ - _____ SP Driver's License # _____ Exp date _____ Issue date _____

Closest living relative name _____ Phone _____

Who may we thank for referring you to T&T Consulting? _____

II. EXEMPTIONS

Please complete the following as applicable

	Name (As shown on social security card)	Date of Birth	Social Security Number	Relationship To Taxpayer	Months in Home
Dependent					
Dependent					
Dependent					
Dependent					
Dependent					

III. REFUND

If you are receiving a refund tell us how you would like to receive the refund. (Check only one)

- Check in the Mail (fees paid up front)
 I'd prefer to make that decision when I know the amount of my refund.
 Direct Deposit to your account (fees paid up front)

Financial Institution: _____

Routing Number: _____ Account Number: _____

Checking or Savings (please circle only one)



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CLIENT INFORMATION SHEET

IV. ADDITIONAL INFORMATION

Did you or your spouse at any time during the year:

Circle: If yes, please provide

Did you live in any other states?

NO YES

Did you work in any other states?

NO YES

If yes, list the states and the dates you lived there:

Receive wages, salaries, or any other employer compensation?

NO YES All W-2 forms

Have you received W-2 forms from ALL employers?

NO YES

Receive unemployment compensation?

NO YES All 1099-G forms

Receive Social Security Benefits?

NO YES All 1099-SSA forms

Receive Alimony?

NO YES

If yes, list amount _____

Pay alimony?

NO YES

If yes, list name of recipient _____

SSN of recipient _____ Amount _____

Do you pay daycare expenses?

NO YES

Provider name & Address

If yes, list amount _____ SSN _____

Receive winnings from gambling? (Lottery, racetrack, casinos, raffles)

NO YES All W-2-G forms

Receive any miscellaneous income? (Prizes, awards, jury duty)

NO YES

If yes, list amount _____

And describe _____

Are you claimed as a dependent on someone else's tax return?

NO YES

Pay interest on student loans?

NO YES

Receive pension, annuity, IRA or retirement income?

NO YES All 1099-R forms

Receive interest on savings, cash, US bonds, stock dividends?

NO YES All 1099-INT

Do you have any of the following?

Home Mortgage?

NO YES All 1098 forms

Medical expenses or pay for health insurance?

NO YES List with amounts

Contributions to charity, church, etc?

NO YES List with amounts

Out-of-pocket expenses or use your personal vehicle on the job?

NO YES List with amounts

Loss from casualty (fire, theft, natural disaster)

NO YES List with amounts

Did you have a job-related move?

NO YES

Contribute to an IRA, SEP, Keogh, or simple retirement plan?

NO YES

Pay college tuition expenses?

NO YES



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Did you or your spouse at any time during the year:

Circle: If yes, please provide

Sell stock, mutual fund, or other securities?	NO	YES	All 1099-B forms
Receive a 1099-MISC?	NO	YES	All 1099-MISC
Own your own business or were self-employed?	NO	YES	
Use a portion of your home exclusively for business?	NO	YES	
Do you own rental property?	NO	YES	
Receive royalties?	NO	YES	
Sell your Home	NO	YES	All 1099-S forms
Sell any other property (equipment, land, etc.)?	NO	YES	
Did you make estimated tax payments?	NO	YES	

Operate a farm?	NO	YES	
Receive installment payments on property sold?	NO	YES	
Have an interest in a partnership, S-corporation, estate or trust?	NO	YES	All K1 forms
Have income as a minister?	NO	YES	

V. SIGNATURE

ALL INFORMATION I HAVE GIVEN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE

IF I CHOSE NOT TO COMPLETE THIS RETURN, UPON TAX INFORMATION BEING INPUT INTO THE COMPUTER BY A TAX PREPARER THERE WILL BE A \$ 50.00 CONSULTATION FEE.

SIGNATURE: _____ Date: _____

Do not write below this line. Tax preparer information only:
TODAY'S DATE: _____ TAX YEAR: _____ AMENDED YEAR: _____

NEW CLIENT: _____ RETURNING CLIENTS: _____

Copies made:

- PHOTO ID
- DRIVER LICENSE
- SUPPORTING DOCUMENTS FOR HOH
- DAYCARE/SCHOOL INFORMATION

ADDITIONAL NOTES (DUE DILIGENCE)



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PREPARATION CHECK LIST FOR TAX RETURN

LIST OF OF DOCUMENTS	✓ CHECK LIST COLUMN
Social Security Card(s)	
Driver's License(s)	
Dependents' Social Security Numbers & Dates of Birth	
Last Year's Federal and State Tax Returns	
Wage Statements - Form W-2	
Pension or Retirement Income - Form 1099-R	
Interest and Dividend Income - Form 1099-INT/Form 1099-DIV	
State Income Tax Refund Amount - Form 1099-G	
Social Security Income - Form SSA-1099	
Unemployment Income - Form 1099-G	
Commissions Received/Paid	
Information on sales of Stocks or Bonds - Form 1099-B	
Self-Employed Business/Farm Income & Expenses - Form 1099-MISC	
Merchant Card and Third-Party Network Payments 1099-K	
Lottery or Gambling Winnings - Form W-2G	
Lottery or Gambling Losses	
Income and Expenses from Rentals	
Income from Partnerships, S Corporations, Trusts, and Estates - Schedule K-1	
IRA Contributions	
Alimony Paid or Received	
Child Care Expenses & Provider Information	
Medical, Eye Care, and Dental Expenses	
Cash and Non-cash Charitable Donations	
Record of Purchase or Sale of Residence	
Mortgage or Home Equity Loan Interest Paid - Form 1098	
Real Estate and Personal Property Taxes Paid	
State or Local Sales Taxes Paid	
Educator Expenses	
Tuition and Education Fees - Form 1098-T	
Student Loan Interest - Form 1098-E	
Casualty or Theft Losses	
Estimated Taxes	
Foreign Taxes Paid	



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