

Family TAX OFFICE

PERSONAL INFORMATION

If married filing separate fill out spouse's information.

TAXPAYER:

First Name _____
Middle _____
Last _____
SSN _____-_____-_____
Birth date _____
Address _____
City _____
State _____ Zip _____
Home Phone (_____) _____-_____
Cell (_____) _____-_____
Email _____
Work (_____) _____-_____
Ext _____
Ok to call _____
Work Email _____
OK to Email _____
Occupation _____

☐ Student ☐ Halftime ☐ Fulltime
☐ US Citizen ☐ Resident Alien ☐ Non resident Alien
☐ Blind ☐ Disabled
☐ Widowed Date of Death _____

I prefer to be contacted by ☐ Home Phone
☐ Cell Phone ☐ Email ☐ Text ☐ Work Email ☐ Any
☐ I AM CLAIMING MYSELF
☐ I AM BEING CLAIMED AS A DEPENDENT ON
ANOTHER RETURN
☐ I WOULD LIKE \$3 MOVED FROM THE GENERAL FUND
INTO THE PRESIDENTIAL ELECTION FUND
(Answering yes, does not affect my tax return)

Drivers License/ID State of Issue _____
Number _____
Issue Date _____
Expiration Date _____

SPOUSE: () NONE

First Name _____
Middle _____
Last _____
SSN _____-_____-_____
Birth date _____
Address _____
City _____
State _____ Zip _____
Home Phone (_____) _____-_____
Cell (_____) _____-_____
Email _____
Work (_____) _____-_____
Ext _____
Ok to call _____
Work Email _____
OK to Email _____
Occupation _____

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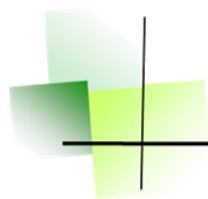
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☐ I WOULD LIKE \$3 MOVED FROM THE GENERAL
FUND INTO THE PRESIDENTIAL ELECTION FUND
(Answering yes, does not affect my tax return)

Drivers License/ID State of Issue _____
Number _____
Issue Date _____
Expiration Date _____

Direct Deposit information (you can elect to deposit up to 3 separate accounts)

Bank Routing Number _____ Acct Number _____ () Checking () Savings

(760) 870-4441 text (858) 301-6100 office (760) 870-7770 fax
14231 Garden Rd Suite 11 Poway Ca 92064
www.FamilyTaxOffice.com



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INCOME INFORMATION

- ☐ W-2 Employment Income
- ☐ Interest/dividends
- ☐ State Tax Refund form 1099G
- ☐ Alimony \$ _____ per Mo /Yr
- ☐ Self Employment
- ☐ Investments-Gains/Losses
- ☐ IRA distributions
- ☐ Retirement Pension
- ☐ Rental Income
- ☐ K-1 Partnership/Beneficiary/Shareholder
- ☐ Farm Income
- ☐ Unemployment
- ☐ Social Security Benefits
- ☐ 1099-misc
- ☐ Gambling Winnings
- ☐ Canceled Debt
- ☐ Unreported Tips
- ☐ Other _____

DEDUCTIONS

- ☐ Educator Expenses
- ☐ Health Savings Account Deduction
- ☐ Moving expenses
- ☐ Alimony Paid \$ _____ per Mo /Yr
- ☐ IRA deduction
- ☐ Student Loan Interest Paid
- ☐ Other _____
- ☐ I am dropping off my documents
- ☐ I will wait while my return is completed
- ☐ I have provided last year's tax return
- ☐ I am interested in providing my last 3 years tax returns along with documents for a complimentary accurate check

CREDITS

- ☐ Foreign Tax Credit
- ☐ Child Care Credit
- ☐ Education Credit
- ☐ Residential Energy Credits
- ☐ Other _____

TAXES

- ☐ First Time Home Buyer Repayment
- ☐ Household Employment Taxes

ITEMIZED DEDUCTIONS ☐ NONE

- ☐ Medical and Dental Expenses
- ☐ Real Estate Taxes
- ☐ Personal Property Tax (DMV Fees)
- ☐ Mortgage Interest
- ☐ PMI's
- ☐ Points Paid/Carry Over
- ☐ Cash to Charity/Church
- ☐ Non Cash Goods Donated Value
- ☐ Casualty Theft or Losses
- ☐ Unreimbursed Work Related Expenses
- ☐ Tax Preparation Fee's
- ☐ Other Expenses _____
- ☐ I have carry back/carry over gains/losses

I understand that Family Tax Office will be preparing my income taxes with the information and documents that I have provided, kept private, confidential and secure. I am under no obligation to file my taxes with Family Tax Office. At anytime, I can request my original documents be returned to me.

Date _____

Client Signature

If, filing a joint return, only one signature is required.

Received by _____ Date _____

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