

Hayes Tax Service - Taxpayer Questionnaire

Taxpayer Information

First Name _____ M.I. _____ Last name _____ suffix _____
Address: _____ City _____ Zip code _____ Own or Rent? _____
Apt # _____
Home Phone # _____ Cell # _____ Date of Birth _____
Social Security # _____
Maritable Status _____ Did it change during the year? _____ Reason _____
If due to death, enter date of death for taxpayer or spouse if during 2007 or 2008 _____
If married or divorced during 2007, will you be filing jointly or separately? _____

If Married filing jointly, please fill in the below for your spouse

First Name _____ M.I. _____ Last name _____ suffix _____
Cell # _____ Date of Birth _____
Social Security # _____
Can you or your spouse be claimed on someone else's tax return as a dependent? _____
Were you or your spouse permanently and totally disabled in 2009? _____

Dependents Information

Do you have any dependents? _____ How many? _____ (if more than 2, list on last pg)
How many months did they live with you during 2009? _____
Did you provide at least 50% of their support? _____
Did you pay any daycare or dependent expenses so that you could work or attend school?
_____ **will need tax provider's name, full address, taxpayer identification #, and the amount paid for each dependent, along with receipts or letter from daycare showing amount paid.
Did you pay tuition expenses for you, your spouse, or dependents? _____ (form 1098-T or receipts)

Dependent # 1

First Name _____ M.I. _____ Last name _____ suffix _____
Date of Birth _____ Social Security # _____ Relationship? _____

Dependent # 2

First Name _____ M.I. _____ Last name _____ suffix _____
Date of Birth _____ Social Security # _____ Relationship? _____

Hayes Tax Service - Taxpayer Questionnaire

Misc

Did you or your spouse receive any tip income not reported by your employer? _____

Did you receive any other income not reported on W-2? _____ (form W-2G for gambling winnings, form 1099-G for unemployment payments received, form 1099-Misc,

Did you receive any dividend or interest income? _____ (form 1099-Int or 1099-Div)

Did you incur any adoption expenses during 2009? _____ (need receipts)

Did you or your spouse make gifts of over \$11,000 to an individual? _____

Did you pay interest on a student loan for yourself, your spouse, or dependents? _____ (form 1098E)

Did you buy or sell any stocks in 2009? _____ (form 1099-B)

Did you receive a distribution from a pension (401K) or profit sharing plan? _____ (form 1099-R)

Did you collect or pay alimony in 2009? _____ If paid, need ex-spouse name & social security # & receipts/proof of amounts payment

Did you start a business, purchase a rental property or farm, or acquire an interest in partnerships, S corporations, or trusts? _____

Itemizing Taxes

Do you own your home and have mortgage interest and/or real estate taxes to deduct? _____ (Form 1098)

Did you purchase or sell a home during 2009? _____

If sold, was it your main residence and did you live in it two out of the last 5 years? _____

Do you have medical or dental expenses not paid or reimbursed by others? _____ (receipts needed)

Did you make any charitable contributions for 2009? _____ (receipts needed)

Did you pay auto registration/tax for 2009? _____ (receipt needed)

Did you have any unreimbursed job related expenses? _____ (receipt needed)

Did you pay to have your taxes prepared last year? _____ (receipt needed)

Did you incur any casualty or theft losses during 2009? _____ (need info/proof of loss, and amount reimbursed by insurance)

Filing and Payment Information

If filing electronically, would you like your tax preparation fees deducted from your refund if you are due one? _____

If due a refund, how quickly are you looking to receive it? _____

Do you want direct deposit of any tax refund or would you prefer a check be issued? _____

***direct deposit- Bank name _____ Routing # _____ Account

If you are not due a refund or having your fees deducted from your refund, will you be paying by cash or credit card? _____ **Payment in full is due before return is actually filed with the IRS.**

Additional Dependents

Dependent # 3

First Name M.I. Last name suffix _____

Date of Birth _____ Social Security # _____ Relationship? _____

Dependent # 4

First Name M.I. Last name suffix _____

Date of Birth _____ Social Security # _____ Relationship? _____

Dependent #5

First Name M.I. Last name suffix _____

Date of Birth _____ Social Security # _____ Relationship? _____