

ACCOUNTING FOR DETAILS, LLC

Best method of contact? Text Phone Email

Date: _____

Main contact person for tax matters? Self Spouse

Referred by: _____

Taxpayer:

Name: _____ Occupation: _____
 First Middle Last More than one job? _____

Mailing Address: _____

S S#: _____ DOB: _____

Contact Number: _____ Email: _____

Vehicle Make/Model: _____ Foreign bank accts: _____

Spouse:

Name: _____ Occupation: _____
 First Middle Last More than one job? _____

S S#: _____ DOB: _____

Contact Number: _____ Email: _____

Vehicle Make/Model: _____ Foreign bank accts: _____

Taxpayer Info:

Please check all boxes that apply:

- Do you have any dependents? (child, mom, dad, grandparent)
- Do you own a business, partnership, c-corp or s-corp, LLC?
- Do you own a home or property?
- Do you have any rental properties?
- Any family member in college or have student loans?
- Did all family members have health insurance all year?
- Did any family member have Obama Care this year?
- Did you purchase an auto or recreational vehicle this year?
- Do you have any investment accounts?(beside employer 401K)
- Did you have any causality or theft losses? (ie flood/fire)

Dependent (1) Name, DOB, & SS#

Dependent (2) Name, DOB, & SS#

Dependent (3) Name, DOB, & SS#

Notes: * If dependents attended school please list school, if private or catholic, grade and tuition amount. If it is daycare or before/aftercare I will need receipt from school or tax id# and address of the daycare. Also if it is a 3, 4, or 5 star facility!**