

# Client Data Checklist

**Primary** \_\_\_\_\_ **SS#** \_\_\_\_\_

**Secondary** \_\_\_\_\_ **SS#** \_\_\_\_\_

*\*\*Please fill out the Secondary information even if you file(d) "Married Filing Separately"*

**Filing Status EACH year:**

**Dependents:**

	S	MFJ	MFS	HoH
2003				
2004				
2005				
2006				
2007				
2008				
2009				

Name	SSN	Date of Birth	Yrs Claimed

▶ **Did you have dependant care expenses?**  YES  NO

**If you answered "YES":**

Child care provider: \_\_\_\_\_  
 EIN or SSN: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 \_\_\_\_\_  
 Total Amount Paid: \_\_\_\_\_ Name(s) of child(ren): \_\_\_\_\_

**Itemized Deductions:**

	Mortgage Interest	Real Estate Tax Paid	Cash Donations	Non-Cash Donations**	Medical
2003					
2004					
2005					
2006					
2007					
2008					
2009					

*\*\*If Non-Cash Donations are over \$500 in any given year, please provide a receipt of donation.*

▶ **Did you have gambling winnings?**  YES  NO *IF YES: YR* \_\_\_\_\_ *AMT \$* \_\_\_\_\_

**If you answered "YES" above, please list documented gambling losses in that year:** \$ \_\_\_\_\_

▶ **Did you buy, sell, or refinance your home?**  YES  NO *IF YES: Please attach closing statement(s).*

▶ **Did you have self-employment or farm income?**  YES  NO *IF YES: Please fill out the SE Worksheet (separate).*

▶ **Did you have rental or royalty income?**  YES  NO *IF YES: Please fill out the Rental Expense Worksheet (separate).*

▶ **Did you have stock or mutal fund sales?**  YES  NO *IF YES: Please attach cost basis documentation.*

▶ **Did you have unreimbursed employee expenses?**  YES  NO *IF YES: Please fill out the URE Worksheet (separate).*

▶ **Did you pay any tuition costs?**  YES  NO *IF YES: Please attach documentation.*

▶ **Did you move over 50 miles for work purposes?**  YES  NO *IF YES: Please attach a list of expenses.*

▶ **Did you have income in any other states besides Texas?**  YES  NO *IF YES: \_\_\_\_\_*

▶ **Did you have alimony, unemployment, or combat pay?**  YES  NO *IF YES: Please attach documentation.*

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