QTP
QuickTaxProfessionals

"The Professional Tax People"
(678) 310-0525 OFFICE or (678) 310-0572 FAX

Tax Pre-Interview Questions

By taking a few minutes to answer the following questions, you can help ensure that your return will be as accurate as possible. Thank you for your cooperation. Please Print.

Name ____________________________ SSN_________________ DOB_________
Spouse____________________________ SSN _________________DOB_______
Address________________________City____________State______Zip______
YourOccupation____________________SpouseOccupation__________________
Phone# ____________Work ____________E-mail Address: __________________
Did Quick Tax Professionals prepare your tax return last year? Yes _____No_____
Are you claimed as a dependent on anyone's return? Yes ______ No ______
Filing Status: Single___ Married ____Separated ____Divorced ____Widow ____
Head of Household ______ Do you live with your parents? Yes ______No ______
Dependent (s)

First Name	Middle	Last	Date of Birth	SSN

Did you receive or pay alimony? Yes ____ No____ If so, which one ____________
Did you receive Social Security or Railroad Retirement? Yes ______ No ______
Did you operate a business or farm? Yes _____ No ________
Did you sell stocks, timber or property? Yes _____ No _____
Did you buy or sell a home or move? Yes ______ No _____
Did you receive any lump sums from retirement, gambling, or other gifts? Yes___ No ___
Did you contribute to an IRA? Yes ______ No ________
Has your return been audited in the last three (3) years? Yes ___ No ____
Are you self-employed? Yes____ No_____
Did you pay Health Insurance? Yes______ No_______
Did you pay Estimated Income Taxes? Yes ______ No ______

To the best of my knowledge this information is true and accurate. I have all receipts, logbooks, and all other documentation that is required to support my claim.

CLIENT SIGNATURE_________________________________DATE______________

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Tax Appointment Checklist

Please bring the following information with you to your tax appointment. All documents needed for accurate filing of your tax return.

Personal Information

_____ Last year's Income Tax Return if you are a new client
_____ Name, Address, Social Security Card Number and Date of Birth for you, your spouse and dependents
_____ Child Care Provider, Name, Address, Tax ID Number and/or Social Security Number
_____ Banking information if Direct Deposit Requested

Income Data Required

_____ Wages and/or Unemployment
_____ Interest and/or Dividend Income
_____ State/Local Income Tax Refund
_____ Social Assistance Income
_____ Pension/Annuity/Stock or Bond Sales
_____ Contract/Partnership/Trust/Estate Income
_____ Gambling/Lottery Winnings and Losses/Prizes/Bonus
_____ Rental Income
_____ Self-Employment/Tips
_____ Foreign Income

Expense Data Required

_____ Child Care Costs
_____ Education/Tuition Costs/Materials Purchased
_____ Medical/Dental Expenses
_____ Mortgage/Home Equity Loan Interest/Mortgage Insurance
_____ Employment Related Expenses
_____ Gambling/Lottery Expenses
_____ Tax Return Preparation Expenses
_____ Investment Expenses
_____ Real Estate Taxes
_____ Estimated Tax Payments to Federal and State Government and Dates Paid
_____ Home Property Taxes
_____ Charitable Contributions Cash/Non-Cash
_____ IRA Contributions/Retirement Contributions
_____ New Home Purchase Expenses
_____ Moving Expenses (Military Only)

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"Checklist for Preparing Your Income Tax Return"

Personal Information

Name & Social Security Numbers:
Your Name, Your Spouse, Dependents

Advance Child Tax Credit Payment

Copy of the IRS notice announcing the amount of your payment
Amount of the payment you received

Child Care Costs

Canceled checks or invoice
Childcare Providers Name
Providers Address
Providers Tax ID or Social Security Number

Education Costs

Receipts for tuition (or canceled checks) for post-high school education
Tuition statement – Form 1098-T

Income Information

Income from Employment (Form W-2 for all employers for whom you or spouse worked

Investment Income

Interest income – Form 1099-INT
Dividend Income – Form 1099-DIV
Proceeds from the sale of stocks, bonds, etc – Form 1099-B
Confirmation slips or brokers statements for all stocks, etc, that you sold during year
Schedule K-1 Form 1065 from investments in partnerships
Schedule K-1 Form 11205 from investments in S Corporations
Income from foreign investments – Amount of foreign taxes paid (you can find this on brokers statement)
Income from stock option exercises & sales: (Form 1099-B)
Sale of employee stock purchase plan shares

Income from State & Local Income Tax Refunds

Form 1099-G from state or local govt.
State Income Tax Return from last year

Business Income

Books/Accounting Records for your business, OR:
Invoices or Billings; Bank Statements, Canceled Checks for expenses
Payroll Records

In addition, you will need:

Invoices for major machinery, equipment, furniture purchases
Logs or other records listing vehicle mileage
Inventory records, if your business maintains an inventory of goods or materials

IRA/Pension Distributions

Form 1099-R for payments from IRA or retirement plans
Account Summary Form for the year or your IRA accounts, or
Deposit receipts and contribution records
If you received a distribution from an IRA account – the most-recently filed Form 8606, if you made contributions in prior years to IRAs that weren't deductible on your return

Rental Property Income

Profit and Loss Statements
Canceled Checks for expenses
Form 1090-Misc or other rental income paid to you
Mortgage Interest (Form 1098)
Property tax payments

Unemployment Income

Form 1099-G from State Unemployment Agency or Unemployment check stubs

Social Security Benefits

Form SSA-1099

Income from Sales of Property (if property sold in 2004)

Sales Proceeds – Bill of sale, escrow statement, closing statement or other records
Cost of property you sold – Invoices or construction contracts and canceled checks

Misc. Income

Jury Duty pay records
Form (s) W-2G for gambling and lottery winnings
Receipts for all gambling purchases
Form 1099-MISC for additional employment or monetary awards
Scholarship records (if you used the money for anything other than tuition, books, and supplies)

Moving Expenses

Invoices from moving companies or Canceled checks

Itemized Deductions

Home mortgage interest
Charity bills, receipts or canceled checks
Records of mileage incurred for charitable purposes

Donations of Property

Receipts from the agency, estimated value of property given
Appraisal fees for expensive donations

Job expenses

Reimbursement check stubs or reports from your employer
Union dues – paycheck stub for automatic withdrawals
Gifts to clients, etc, showing date, cost, & description
Supplies, receipts or bills
Property purchased for use in your work – invoices, receipts
Uniform and special clothing, bill or paycheck stubs showing deductions
Seminar fees – receipts or invoices
Receipts for small tools and supplies you purchased
Job travel information (hotel bills, restaurant tickets, parking fees
Job search expenses: long-distance call bills, resume cost for printing, mailing, etc...
Transportation bills and mileage records

Other Misc. Deductions

Tax return preparation fees, Cost of tax return preparation software & books
Safe Deposit box rental fees

Medical & Dental Expenses

Medical bills or canceled checks
Form SSA-1099 for Medicare premiums paid from your Social Security benefits
Mileage records for trips to the doctor, clinics, etc…

Real Estate Taxes

Personal Property Taxes, (license and motor vehicle tags)

Direct Deposit Information

If you want your refund deposited directly into your bank account, you need a copy of bank deposit clip