

Mobile 1040 Taxpayer 2012 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 # _____ Driver's License # _____ State _____

Maritable Status _____ Did it change during the year? _____ Reason _____

If due to death, enter date of death for taxpayer or spouse if during 2011 or 2012 _____

If married or divorced during 2012, 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 # _____

Bank Product Applicants: Driver's License # _____ State _____

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 2012? _____

Dependents Information

Do you have any dependents? _____ How many? _____ (if more than 2, list on last page)

How many months did they live with you during 2012? _____

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? _____

Earned Income Credit Qualifications-tax preparer will go thru checklist to see if you qualify.

*****Can't claim if married filing separately, under 25 or over 65 with no qualifying children, or if you are the dependent of another person or the qualifying child of another person.**

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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 2012? _____ (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 2012? _____ (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 2012? _____ **If paid, need ex-spouse name & social security number & 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 2012? _____ (need closing statements for sale)

If sold, was it your main residence and did you live in it 2 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 2012? _____ (receipts needed)

Did you pay auto registration for 2012? _____ (receipt needed)

Did you have any un-reimbursed 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 2012? _____ (need info/proof of loss, and amount reimbursed by insurance)

Filing and Payment Information

Would you like to file your return electronically or mail it in? _____

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

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, check or credit card? _____ **Payment in full is due before return is actually filed with the IRS.**

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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? _____

Dependent # 6

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

Dependent # 7

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