

Lina's Tax Team

Client Information Sheet

Name: _____ Spouse: _____

SSN#: _____ SSN#: _____

Date of Birth: _____ Date of Birth: _____

Occupation: _____ Occupation: _____

Email: _____ Email: _____

Address: _____

(You want to use on your tax return for IRS / FTB/ Taxing Authority correspondence)

Cell Phone: _____ Cell Phone: _____

Dependents:

<u>Name</u>	<u>Date of Birth</u>	<u>Social Security#</u>	<u>Relationship</u>	<u>College (Y/N)</u>
_____	____-____-____	____/____/____	_____	_____
_____	____-____-____	____/____/____	_____	_____
_____	____-____-____	____/____/____	_____	_____
_____	____-____-____	____/____/____	_____	_____

Circle Filing Status for 2013 tax: Single Married Joint Married Separate Head of Household

Direct Deposit or Debit: Bank Name: _____

Routing Number: _____ Bank Account: _____

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| <p>1. Are you self-employed or do you receive hobby income? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>2. Did you receive rent from real estate or other property? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>3. Did you have any debts cancelled, forgiven or refinanced? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>4. Did you go through bankruptcy proceedings? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>5. Did you receive income from gravel, timber, minerals, oil, gas, copyrights, patents? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>6. Do you have a foreign bank account, trust or business? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>7. Do you provide a home for or help support anyone not listed under dependents above? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>8. Do you have any children under the age of 19 or 19 to 23 year old students with unearned income of more than \$950? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> | <p>9. Were there any births, deaths, marriages, divorces or adoptions in your immediate family? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>10. Did you give a gift of more than \$13,000 to one or more people? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>11. Did you pay expenses for yourself, your spouse, or your dependent to attend classes beyond high school? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>12. Did you purchase a new alternative technology vehicle or electric vehicle? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>13. Did you install any energy property to your residence such as solar water heaters, generators or fuel cells or energy efficient improvements such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditioners or water heaters? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>14. Did you receive any correspondence from the IRS or State Department of Taxation? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> |
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