

Phone: (254) 628-2001
Fax: (254) 628-2003

ALL IN ONE TAX SERVICES

Appointment Date: _____
Time: _____

1705 S Fort Hood Street, Ste. 101, Killeen, TX 76542, PO Box 690219, Killeen, TX 76549

Soyong Yu

Katie Grant

Vickie Miller

It's tax time again!

As always, your personal information is completely confidential, and is never shared with others without your *written* consent. Please look over the following items needed to process your return. *Itemized Deductions sheet provided upon request.*

***When dropping off or meeting for the first time – Please provide a copy of your 2015 Tax Return if we didn't prepare your return last year.**

Primary Name: _____ SSN: _____ DOB: _____ Deceased
in 15? Date: _____

Spouses Name: _____ SSN: _____ DOB: _____
(Deceased in 15?) Date: _____

Home address: _____ Apt: _____ City: _____ State: _____ Zip: _____
Home Phone: _____ Work Phone: _____ Alternate Phone: _____

Is this a new Address for 2016? If so, please check box and provide old address

Previous address: _____ Apt: _____ City: _____ State: _____ Zip: _____

Previous Phone: _____

Do you want \$3 to the Presidential Election Campaign? Yes No Spouse? Yes No

PRIMARYS OCCUPATION: _____ email: _____

SPOUSE'S OCCUPATION: _____ email: _____

DEPENDENTS: (other than self or spouse)

<u>NAME (First, Last)</u>	<u>Date of Birth</u>	<u>Soc. Sec. #</u>	<u>Relationship to you</u>	<u># of months child was in home in 2016</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Can you be claimed as a dependent on anyone's return for 2016? Yes No

1040ES (Estimate Tax) 4/15 \$ _____; 6/15 \$ _____; 9/15 \$ _____; 1/15/16 \$ _____

Add' Income Items to have ready: W-2s, Interest, Dividends, Pensions/Retirement info, Rental Info., Sale of Property, Business Income, Alimony, Lottery & Bingo Winnings, Tips, Misc Income info (1099-MISC).

INTEREST EARNED: Savings, CDs, Property contracts, Partnership K-1s, Bond Interest, etc.

<u>Payer Name (Bank, Credit Union, Other)</u>	<u>Amount</u>	<u>Payer Name</u>	<u>Amount</u>
_____	_____	_____	_____
_____	_____	_____	_____

Social Security Benefits: Bring SSA-1099 form. Amounts: Self \$ _____ Spouse \$ _____ Unemployment compensation:

IRA Withdrawals in 2016: Self \$ _____; Spouse \$ _____; Balance in all IRAs (as of 12/31/15) \$ _____

Unemployment Compensation: ALL Unemployment is taxable. Form 1099 Totals: \$ _____

SALES AND PURCHASES: If you SOLD or BOUGHT Property in 2016, Bring Closing Statements of:

_____ SALE

_____ SALES Statement of Property Sold

_____PURCHASE Statement of Property Bought

_____Refinance Closing Statement

***Is this your FIRST home purchase? Yes No If no, Did you purchase your OLD home over five years ago? Yes No**

STOCKS or MUTUAL FUNDS: If SOLD in 2016, bring statements of Purchase/Sale/Reinvestments _____

STUDENT LOAN INTEREST paid in 2016 \$ _____ **ADJUSTMENTS & TAX CREDITS**

IRAs: Contributions: Self \$ _____ Spouse \$ _____; **ROTH IRAs:** Self \$ _____ Spouse \$ _____

EDUCATION CREDITS: Amount paid for Tuition (Bring Form 1098-T): \$ _____ Books paid out of pocket (unreimbursed)

QUALIFIED ELECTRIC/HYBRID VEHICLE: Cost (w/tax) of Vehicle bought in 2016 \$ _____ **CHILD**

& DEPENDENT CARE: Total Paid in 2016: \$ _____

Persons or Organizations who provided Dependent Care

Provider Name	Address (with zip code)	I.D. # (S.S. or E.I.N.)	Amount

**** PLEASE NOTE!! We CANNOT discuss your financial information with ANYONE other than your legal spouse unless we are given WRITTEN permission by you ** AIO Staff**

EMAIL US YOUR QUESTIONS! info@allinonetaxservices.com