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1705 S Fort Hood Street, Ste. 101, Killeen, TX 76542

ALL IN ONE TAX SERVICES

Appointment Date: _____
Time: _____

Soyong Yu

Katie Grant

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 19 Tax Return if we didn't prepare your return last year.**

Primary Name: _____ SSN: _____ DOB: _____
Deceased in ? Date: _____
Spouses Name: _____ SSN: _____ DOB: _____
Deceased in 19? Date: _____
Home address: _____ Apt: _____ City: _____ State: _____ Zip: _____
Home Phone: _____ Work Phone: _____ Alternate Phone: _____

Is this a new Address for 19? 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 20</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Can you be claimed as a dependent on anyone's return for 19? Yes No

1040ES (Estimate Tax) 4/20 \$ _____; 6/20 \$ _____; 9/20 \$ _____; 1/15/20 \$ _____

Add'l Income

Items to have ready: W-2s, Interest, Dividends, Pensions/Retirement info, Rental Info., Sale of Property, Business Income, Alimony, Lottery, Bingo, & other Gambling 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 20: Self \$ _____; Spouse \$ _____; Balance in all IRAs (as of 12/31/20) \$ _____

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

SALES AND PURCHASES: If you SOLD or BOUGHT Property in 20, 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 20, bring statements of Purchase/Sale/Reinvestments _____

STUDENT LOAN INTEREST paid in 20 \$ _____ **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)

CHILD & DEPENDENT CARE: Total Paid in 20: \$ _____

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 current legal spouse unless we are given **WRITTEN** permission by you **** AIO Staff**

EMAIL US YOUR QUESTIONS! info@allinonetaxservices.com

***NEW THIS YEAR!!!** Schedule your ZOOM or Facetime Virtual appointment! Let's all stay safe and Socially Distance When possible! Call or txt for more details!