

2014 TAX YEAR QUESTIONNAIRE

NAME: _____ PHONE: _____

ADDRESS: _____ PHONE: _____

CITY: _____ ST: _____ ZIP: _____ DATE: _____

EMAIL: _____

(FOR OFFICE USE ONLY)

What is your marital status as of December 31st _____ Single _____ Widowed _____
 _____ Separated _____ Married.
 If Married does your Spouse live in the same house? Yes or No.
 Do you need to file separate from Spouse? Yes or No.
 Do you have children living in your home? Yes or No.
 Are you supporting any other person? Yes or No.
 Do you have health Insurance? Yes or No. Is it employer provided? Yes or No.

New Client: Yes or No
 Received Date: _____
 Given: BLM, CD, IN, _____
 Completed: _____
 Pickup: _____
 Scanned Photo ID _____
 Scanned SS Card _____
 Previous Year Taxes _____

Yes	No	INCOME	
		Interest Income and/or Dividend Income	W2
		Alimony Income	W2G
		Self Employed Business Income Expenses	K-1
		Automobile Mileage/Expenses	1098
		Gains/Losses from Sales of Stocks, Securities & Capital Assets	1099A
		Income or Loss from S Corporations, Partnerships & Trust	1099B
		Income or Loss from Rentals & Royalties	1099C
		Income or Loss Farm	1099Div
		Unemployment Compensation	1099G
		Social Security Income, IRA Distribution, Annuity Distribution	1099Int
		Gambling Winnings	1099Misc
		Cancellation of Debt/Sale of Home/Foreclosures/Short Sale	1099R
		Do you have a pin from IRS?	1099S

ADJUSTMENTS TO INCOME			
		Alimony Paid	1095
		Moving Expenses	Refund: Direct Deposit, Check in Mail, Owe IRS Paying IRS: Direct Debit, Credit Card, Payment Paying ATI, Inc.: Cash, Check or Credit Card <i>Direct Deposit Refunds received within 2 weeks</i> <i>Refunds by Check received within 4 weeks</i>
		Do you have a Health Savings Account or Health Insurance?	
		Did you contribute to an IRA?	
		Did you "roll over" a retirement plan distribution into another plan?	
		Educator Expenses for Teachers	
		Student Loan Interest	

TAXES & CREDITS	
	Estimated Taxes
	Child or Dependent Care Expenses
	Home Energy Credit
	Alternative Motor Vehicle Credit
	Education Expenses - Tuition Fees

ITEMIZED DEDUCTIONS	
	Medical: Health Insurance, LTC
	Medical Miles
	Prescriptions
	Lodging
	Taxes: Real Estate
	Sales Tax
	State Taxes, Car Registration
	Mortgage Interest Paid and/or points
	Charity
	Job Expenses
	Tax Preparation Fee
	Casualty Losses
	Legal Fees Associated with Income

Notes:

I have reviewed all documents and all the information is correct. I will not hold ATI, Inc. accountable if any information I furnished to them is incorrect. I am responsible for informing the government & ATI, Inc. of any changes I might become aware of after today.

Client's Signature: _____

