

# Welcome to True Blue Tax Service

**You** Name \_\_\_\_\_ Social Security # \_\_\_\_\_

D.O.B. \_\_\_\_\_ Occupation \_\_\_\_\_ Phone # \_\_\_\_\_

Address \_\_\_\_\_

**Spouse** Name \_\_\_\_\_ Social Security # \_\_\_\_\_

D.O.B. \_\_\_\_\_ Occupation \_\_\_\_\_ Phone # \_\_\_\_\_

Address \_\_\_\_\_

## **Dependents:**

Name \_\_\_\_\_ Social Security # \_\_\_\_\_

D.O.B. \_\_\_\_\_ Months in your home \_\_\_\_\_ Daycare costs \_\_\_\_\_

Name \_\_\_\_\_ Social Security # \_\_\_\_\_

D.O.B. \_\_\_\_\_ Months in your home \_\_\_\_\_ Daycare costs \_\_\_\_\_

Name \_\_\_\_\_ Social Security # \_\_\_\_\_

D.O.B. \_\_\_\_\_ Months in your home \_\_\_\_\_ Daycare costs \_\_\_\_\_

Name \_\_\_\_\_ Social Security # \_\_\_\_\_

D.O.B. \_\_\_\_\_ Months in your home \_\_\_\_\_ Daycare costs \_\_\_\_\_

## **Items to bring:**

Copy of last year's return if not prepared by True Blue Tax

Signed copy of Engagement Letter

Original W-2 and any 1099 forms (1099Misc, 1099R, etc)

Hobby income (Ebay, Etsy, crafts etc)

Brokerage statements

Closing statements for sale or purchase of real property

Copies of any adoption expenses incurred

Documentation of large casualty/disaster

Dependent returns needing to be completed

Bankruptcy paperwork

Documentation of move made because of job

Any IRS notices or other finance related notices that you have received

Disability or Unemployment benefit documents

# Welcome to True Blue Tax Service

## **Other important questions**

Did you inherit assets last year?	Yes	No
Do you have paid employees or house help?	Yes	No
Did your marital status change?	Yes	No
Do you have foreign income, bank accounts or trust?	Yes	No
Did you have a short sale, foreclosure or bankruptcy?	Yes	No
Do any of your dependents have investment income over \$1,800?	Yes	No
Have you received or paid alimony?	Yes	No
Did you buy/sell stock last year?	Yes	No

## **E File and Refunds**

True Blue Tax E-files all returns unless there is a need to send in a paper return.

Do you want your refund direct deposited?                      Yes   No

If yes, please provided a voided check (if not paying by check)

Which type of account is this?   Checking   Savings