

Name: _____

(last) (first mi taxpayer) (first mi spouse)

*If new to us please send us a copy of last years return

Address _____

(street) (city) (state & zip)

City_ Village_ Township_ of _____

County: _____ School District: _____

Phone: (____)-____-____ Best Time to call for Phone Interview

Please specify day____ time____ AM__ PM__

Can Jezeski Accounting and Tax Service discuss your return with the IRS if necessary? Y / N

Marital Status: Single__ Married__ Divorced__or Recently Widowed__

Divorced or Widowed please supply date _____

8332 required to claim dependent children?Y__N__ If yes send a copy

Occupations: _____, _____

(taxpayer)

(spouse)

Family Members Name D.O.B. SS # First, MI,

Last MM/DD/YY

(t) _____ - _____ - _____

(s) _____ - _____ - _____

(1) _____ - _____ - _____

(2) _____ - _____ - _____

(3) _____ - _____ - _____

(4) _____ - _____ - _____

(5) _____ - _____ - _____

Please state the types and quantity of forms you are sending ie;
W2's__ 1099Int.__ 1099Div__ 1098 __ 1099S__ 1099G or W2G__1099R__
1099B__ others please describe and state quantity of each.

Did you sell any stocks, bonds, or mutual funds? Yes__No__ if yes
Please send supporting documents concerning item sold, date purchased
and sold, purchase price and sale price

Are you self employed Yes__ No__ If yes, supply type of business or
farm product or service and Employer ID number if you have one.
Total sales, cost of sales and all expenses including beginning and
ending inventory. Assets purchased with date and cost, any assets
sold with sale price. Send copy of last years depreciation
schedule.

If you have rental property supply rents received, expenses, assets
acquired or sold and a copy of last years depreciation schedule.

Did you receive income from any other sources ie;

Unemployment Comp. Y_ N_ Amt. \$_____

Repay_____W/Holding_____

IRA or Pension Dist. Y_ N_ # of forms _____ Rolled Over Y__N__

Alimony__ Family Support__ Child Support__ jury duty__ gambling

winnings__ distributions__ etc. Please provide documentation and /or
backup data

Did you pay or have deducted any of the following;

IRA Deductions: (H)Y_ N_ Amt. \$_____ (W) Y_ N_ Amt. \$_____

Other Retirement Plans: Y_ N_

Type:_____ on W2 Y_ N_ Amt. \$_____

_____ Y_ N_ \$_____

Did you Pay; Alimony or Family Support payments Yes__ No__

Recipients

Name:_____ SS#_____

Did you pay rent or Property taxes?

Rent Amt.\$_____ #Mo's_____ Heat Incl. Y__ N__ *Rent Cert: Y__ N__

Property Taxes: #of Tax Bills_____ Amt.paid in the tax year.

\$_____, \$_____, \$_____, \$_____ Lottery Credit Y__ N__ Amt. \$_____

***Note: Wisconsin residents, If Homestead candidate, Rent**

Certificates or Property Tax Bills must be in our hands or credit

will not be given.

Did you pay for;

Child Care: Y_ N_ was child care paid for through employer

sponsored program Yes__ No__ Number of children qualifying _____

Amt. Paid \$_____ Reimbursements received \$_____

Names, addresses, and SS #'s of providers must be provided to claim

child care credit.

Did you buy or sell a home? if yes, include closing statement.

EDUCATION: Applies to taxpayer, spouse and dependent children

Student Name: _____

Year of School: 1st?___ 2nd?___ Other?___ Full Time___ Part Time ___

Tuition costs \$_____ Other Fees: Books \$_____ Dorm R&B \$_____ Etc.

Send form 1098T and other documentation.

Grants Received: \$_____ Education IRA's used: \$_____

Student Loan Interest Paid: \$_____ Graduation Date: _____

Estimated tax payments made: Y__ N__ Federal: \$_____, \$_____,

\$_____, \$_____, State: \$_____, \$_____, \$_____, \$_____,

Amounts applied to this year from last year Fed \$_____; State \$_____

Itemized deduction Items; Mortgage interest, Medical Expenses,

Charitable Contributions, Misc. Expenses ie; tax prep fee, employee

business expense,etc. Please list and supply supporting

documentation.

If there is any other information you believe may be useful and

important to the preparation of your tax return include it with your

tax package.

To the best of my knowledge, the above information is correct and includes all income, deductions and other information necessary for the preparation of this year's Income Tax Returns, for which I have adequate contemporaneous records.

Please Sign

Date

Return will not be prepared without signature, if joint return both spouses must sign.