

Solutions Network Tax Services

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Information Needed to Prepare U.S. Tax Return

Please send copies of W2s, and evidence of foreign income (if any) and any 1099s received. For deductible expenses such as charitable contributions, unreimbursed employment or business expenses, etc., please include copies of any documentation available. In all events, it will be assumed that written documentation to support such deductions is available and will be kept on file by taxpayer.

If not currently a client, please fax a copy of last year's federal and state tax returns. This gives us much information which will be the same for the current year, thus allowing us to complete your return more quickly and efficiently.

WHAT WE DO

We are committed to legally doing, all in our power to either minimizing any tax obligations that you may have, and/or maximize any refunds that you may be entitled to. Unlike other companies that simply take the information you provide and then let the chips fall where they may. (You've undoubtedly experienced this). With most companies, no matter how the liabilities came out, you simply owed what you owed. ***That is not what we do.***

First, we take the information that you put it into the system as any other tax professional would do...

Second, Only after that first pass, do we ***really we go to work.*** We then analyze it to find the most beneficial structuring of said information to optimize the ultimate outcome of your return.

We don't do anything that other preparers *Can't* do... we just do more than they *WILL* do. We are committed to helping you keep all that's yours.

What we need from you:

1. Complete this form to the best of your ability. Many questions will not be applicable to you.
2. In lieu of answering the various **Income Questions** are below, you may simply fax us any W-2s, 1099's or other income information that you have.
3. Then Fax to **877 469 4558**, the Service ID Code (if applicable) and any tax information that you have received from your
 - a. Employer
 - b. Lender on home (interest and taxes paid to or through them).
 - c. 1099 misc for any self employment income
 - d. 1099 g for unemployment compensation
 - e. Any other Tax related forms, i.e. dividend, interest, or partnership income.
4. Any information on activities (hobbies or even favors), that produce income or compensation, no matter how little. Remember, often, there are many legal deductions, that will let you not only zero out that income, but create a loss that will lessen your overall Gross Income, often lessening your tax liability or increasing earned income credits and/or refunds.
 - a. Examples, sewing, handyman, mechanic, musician, babysitting, cooking for others, animal breeding (you don't need license to take the deductions), (we actually once created a legitimate \$5,000 loss for someone who bred snakes for fun), it increased his refund by over \$1,000!). The examples are almost endless.
5. Just give us the information, we will analyze and maximize your return.
6. Upon receipt of the above we will then let you know if the details of your return require any adjustment to fees.

Do You Have Back Taxes You Haven't Filed?

Often people don't file taxes because they are afraid of the result. Let us take a look at them. In most cases we will be able to chop them down to a reasonable amount. Even more than that, we have had many people that were afraid to file because they thought they would owe... We legally got them huge refunds!

PRINT CLEARLY **Service ID Code** _____ **Intake Form**

SSN or ITIN of person listed **1st** on tax return: _____ - _____ - _____

Name as written on SSN card/ITIN letter: First: _____ Middle: _____ Last: _____

SSN or ITIN of spouse (listed **2nd** on tax return): _____ - _____ - _____

Spouse's name on SSN card/ITIN letter: First: _____ Middle: _____ Last: _____

Current Mailing Address (Street & Apt #): _____

Zip Code: _____ City: _____ State: _____

Email Address: _____

		Taxpayer	Spouse
Phone Numbers	Daytime	(____) _____ - _____	(____) _____ - _____
	Evening	(____) _____ - _____	(____) _____ - _____
	Cell Phone	(____) _____ - _____	(____) _____ - _____
Birth Date (month/day/year)		____/____/____	____/____/____
Current Occupation		_____	_____

Circle if Legally Blind: Taxpayer-Blind Spouse-Blind

Circle if you want \$3 to go to the Presidential Election Campaign: Taxpayer-Yes Spouse-Yes

Note: This doesn't cost you anything. Checking the box does not change the amount of your refund or taxes owed.

First Name <i>(do not list you)</i>	Last Name <i>or your spouse</i>	Date of Birth <i>(mo/day/year)</i>	SSN or ITIN	Relationship to You	# months during year lived with you	Child Care Expense	Student	Perm. & Totally Disabled	Lives in what country

On December 31, you were: Single Married Married, living apart since (date) _____
 Divorced: year _____ Widowed: year _____

Yes No Is there a divorce decree or a signed Form 8332 that allows someone else to claim your children?

Yes No **Can your parents or someone else claim you on their tax return?**

List everyone who lived in your home or outside your home that you supported during the tax year:

		/ /	- -			Y or N	Y or N	Y or N	
		/ /	- -			Y N	Y N	Y N	
		/ /	- -			Y N	Y N	Y N	
		/ /	- -			Y N	Y N	Y N	
		/ /	- -			Y N	Y N	Y N	

Do you want to have your refund deposited directly into a bank account? Yes No
This is the FASTEST way to get your money! You may deposit your refund in up to 3 accounts.

Bank Name: _____ Routing #: _____ Account #: _____

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Bank Name: _____ Routing #: _____ Account #: _____

Yes No **Did you do any of the following activities last year?**

Multiple stock or mutual fund sales ~ Sold a home or business ~ Received rental income ~ Received royalties or trusts **If so, send 1099, 1098 or relevant form.**

Yes No **Has your tax return ever been rejected or have you had problems e-filing?**

INCOME: In _____(year), did you receive:

1040 Line-Form

- (7-B) Yes No W-2 forms for every job you worked during the tax year. How many W-2s? _____
- (7-A) Yes No Tips not reported on W-2. How much? _____
- (7-i) Yes No Scholarship, grant or fellowship (1098-T)
- (8/9-B) Yes No Interest or Dividends (from checking/savings acct, bonds, CD, brokerage acct) (1099-INT/DIV)
- (11-B) Yes No Alimony income paid to you
- (12-i) Yes No 1099-Misc forms. How many? _____
- (12-i) Yes No Cash or checks paid to you for work you did. How much? \$ _____
- (15/16-i) Yes No Distribution from an IRA, pension or annuity (1099-R)
- (17-NO) Yes No Rental income, royalties, trusts
- (19-B) Yes No Unemployment compensation (1099-G)
- (20-B) Yes No Social Security (SSA 1099 – Not SSI)
- (21-B) Yes No Gambling winnings (Form W-2G) or other awards or prizes
- (21/34-B) Yes No Jury duty pay (___ check here if you gave your jury duty pay to your employer)
- (21-A) Yes No Foreclosure on a property or a cancelled or forgiven debt (1099-C)

EXPENSES: In _____(year), did you pay for:

- (23-i) Yes No Educator expenses
- (25-i) Yes No Health Savings Account (8889)
- (30-i) Yes No Penalty on early withdrawal of savings (1099-INT box 2 or 1099 OID)
- (31-B) Yes No Alimony paid (Recipient's SSN: _____-_____-_____))
- (32-i) Yes No Contribution to traditional IRA
- (33-B) Yes No Student loan interest (Form 1098-E if paid \$600+)
- (34/49-i) Yes No Tuition and fees for you or your dependents
- (47-B) Yes No Child care or dependent care that allowed you to work (2441)
- (50-i) Yes No Energy-saving improvements to your home (5695)
- (53-B) Yes No Contributions to Retirement Savings (may be indicated on W-2) (8880)
- (65-i) Yes No Estimated tax payments

ITEMIZED DEDUCTIONS: In _____(year), did you have expenses for:

To itemize on Schedule A for 2007:

- (10/11-i) Yes No Mortgage interest paid on your home *Total of these expenses must be*
- (6-i) Yes No Property taxes **paid** on your home. Date and amount paid: _____ *more than \$5,350 for singles,*
- (16/17-i) Yes No Donations to charities *\$7,850 for single head of household,*
- (1-i) Yes No Unreimbursed medical expenses *and \$10,700 for married couples.*
- (i) Yes No Purchase of a car (Preparer: add sales tax on car to General Sales Tax worksheet)

TAX ISSUES (A)

- Yes No Have you ever had a problem claiming the Earned Income Tax Credit (EITC)?
- Yes No Have you received a letter from the IRS?

If Applicable.

PERSONAL ITEMIZED DEDUCTIONS.

- Mortgage interest _____
- Real estate taxes _____
- Personal Taxes, i.e. auto registration, _____
- Legal fees _____
- Charity _____

Name, address, item and amount _____

Name, address, item and amount _____

Name, address, item and amount _____

Purchase Loan or Refinance Loans Originated The Subject Tax Year

Property Address, _____
date, _____ Interest _____ points paid _____

Usually reported to you via a **form 1098**

UREIMBURSED EMPLOYEE EXPENSES- Do you have expenses required for you to be successful at your job that are not reimbursed by your employer?

Advertising _____

Business Gifts _____

Educational expenses (seminars, business publications) _____

Mileage _____

Make, Yr, & Model of car, total miles driven _____

Total miles driven for this business _____

Date put into use for business _____

Major purchases for business _____

i.e. computers, printer, etc... Item _____ Purchase date _____ Cost _____

i.e. computers, printer, etc... Item _____ Purchase date _____ Cost _____

i.e. computers, printer, etc... Item _____ Purchase date _____ Cost _____

Insurance _____

Business Supplies (ink, paper, folders, etc) _____

Shipping Expenses _____

Legal Fees _____

Meals and Entertainment _____

Travel Hotel, Car Rental _____

Utilities _____

Misc Items. _____

i.e. cell phone, internet, etc... _____

Rental Property if any.

Information regarding real estate rentals.

Address and **income** from rental #1 _____

Total interest paid on rental #1 _____

Total Property Taxes Paid on rental #1 _____

Repairs and Maintenance on rental #1 _____

Insurance _____

Misc Expenses _____

Address and **income** from rental #2 _____

Total interest paid on rental #2 _____

Total Property Taxes Paid on rental #2 _____

Repairs and Maintenance on rental #2 _____

Insurance _____

Misc Expenses _____

Address and **income** from rental #3 _____

Total interest paid on rental #3 _____

Total Property Taxes Paid on rental #3 _____

Repairs and Maintenance on rental #3 _____

Insurance _____

Misc Expenses _____

Business Expenses- Business #1 Name _____
 Business Address (if different than home) _____

INCOME

Gross Income
 Income received via 1099. _____
 Income received but no 1099 _____
 Income from merchandise sales (if any) _____
 Cost of Merchandise _____
 Refunds _____
 Advertising _____
 Business Gifts _____
 Commissions and Fees _____
 Interest _____
 Bank Fees _____
 Educational expenses (seminars, business publications) _____
 Mileage
 Make, Yr, & Model of car, total miles driven _____
 Total miles driven for this business _____
 Date put into use for business _____
 Major purchases for business
 i.e. computers, printer, etc... Item _____ Purchase date _____ Cost _____
 i.e. computers, printer, etc... Item _____ Purchase date _____ Cost _____
 i.e. computers, printer, etc... Item _____ Purchase date _____ Cost _____
 Insurance _____
 Business Supplies _____
 Shipping Expenses _____
 Legal Fees _____
 Meals and Entertainment _____
 Travel Hotel, Car Rental _____
 Utilities _____
 Office Expense (not home office) _____
 Rent or Lease
 Equipment Rentals, vehicles, etc... _____
 Misc Items.
 i.e. cell phone, internet, etc... _____

HOME OFFICE EXPENSES – Is this a day care facility? Circle one Yes No

Will only offset your business income.
 Will not create a business loss lowering your employee income.
 Square footage of entire home _____
 Square footage of portion used **exclusively** for business _____
 Utilities for entire home _____
 Entire Mortgage Interest Amount _____
 Real Estate Taxes Paid _____
 If Renting, Rent paid in tax year. _____

Business Expenses- **Business #2** Name _____

Business Address (if different than home) _____

INCOME

Gross Income

Income received via 1099. _____

Income received but no 1099 _____

Income from merchandise sales (if any) _____

Cost of Merchandise _____

Refunds _____

Advertising _____

Business Gifts _____

Commissions and Fees _____

Interest _____

Bank Fees _____

Educational expenses (seminars, business publications) _____

Mileage

Make, Yr, & Model of car, total miles driven _____

Total miles driven for this business _____

Date put into use for business _____

Major purchases for business

i.e. computers, printer, etc... Item _____ Purchase date _____ Cost _____

i.e. computers, printer, etc... Item _____ Purchase date _____ Cost _____

i.e. computers, printer, etc... Item _____ Purchase date _____ Cost _____

Insurance _____

Business Supplies _____

Shipping Expenses _____

Legal Fees _____

Meals and Entertainment _____

Travel Hotel, Car Rental _____

Utilities _____

Office Expense (not home office) _____

Rent or Lease

Equipment Rentals, vehicles, etc... _____

Misc Items.

i.e. cell phone, internet, etc... _____

HOME OFFICE EXPENSES – Is this a day care facility? Circle one Yes No

Will only offset your business income.

Will not create a business loss lowering your employee income.

Square footage of entire home _____

Square footage of portion used **exclusively** for business _____

Utilities for entire home _____

Entire Mortgage Interest Amount _____

Real Estate Taxes Paid _____

If Renting, Rent paid in tax year. _____