

# Solutions Network Tax Services

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## Information Needed to Prepare your 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 **877 604 6636** the **ASN 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. **Business Deductions-** Any information on activities (hobbies or even favors), that produce income or compensation (beer), no matter how little. Remember, often, there are many legal deductions, that will let you not only zero out your tax liability from your job, but even create ***an actual 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 1<sup>st</sup> on tax return: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Name as written on SSN card/ITIN letter: First: \_\_\_\_\_ Middle: \_\_\_\_\_ Last: \_\_\_\_\_  
.....

SSN or ITIN of spouse (listed 2<sup>nd</sup> 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	
<b>Phone Numbers</b>	Daytime	( ) _____ - _____	( ) _____ - _____		
	Evening	( ) _____ - _____	( ) _____ - _____		
	Cell Phone	( ) _____ - _____	( ) _____ - _____		
<b>Birth Date (month/day/year)</b>		_____/_____/_____	_____/_____/_____		
<b>Current Occupation</b>		_____	_____		

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.

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:

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

Bank Name: \_\_\_\_\_ Routing #: \_\_\_\_\_ Account #: \_\_\_\_\_

Bank Name: \_\_\_\_\_ Routing #: \_\_\_\_\_ Account #: \_\_\_\_\_

**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 regarding a Tax Issue?  
If so, if they letter is still available please send it to us so we can see if it impacts this years filing. If it does, we'll work on rectifying the issue.

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 the relevant forms.**

**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 \_\_\_\_\_, did you have expenses for:**

- (10/11-i) Yes  No  Mortgage interest paid on your home- Provide lender's 1098
- (6-i) Yes  No  Property taxes **paid** on your home. Provide lender's 1098
- (16/17-i) Yes  No  Donations to charities- see below
- (1-i) Yes  No  Unreimbursed medical expenses see below
- Yes  No  **Purchase of a car** If it is also used for business, **Please provide:**

- Purchase price, including sales tax \_\_\_\_\_
- Amount of interest paid during year \_\_\_\_\_
- Tolls, parking fees, registration, etc \_\_\_\_\_

**NORMAL 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**

**UNREIMBURSED 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...
    - \_\_\_\_\_
    - \_\_\_\_\_
    - \_\_\_\_\_
    - \_\_\_\_\_

**DO YOU HAVE *RENTAL* PROPERTY?**

**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 for year \_\_\_\_\_ i.e. 13,487

Total miles driven for this business \_\_\_\_\_ i.e. 5,387

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 FOR THIS BUSINESS – Is this a day care facility? Circle one Yes No**

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. \_\_\_\_\_

**Other Business- 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 for year \_\_\_\_\_ i.e. 13,487  
 Total miles driven for this business \_\_\_\_\_ i.e. 5,387  
 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 FOR THIS BUSINESS – *Is this a day care facility? Circle one Yes No***

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. \_\_\_\_\_