

Basic Information for Filing Individual Tax Return

1. Personal Information

	Name	SSN	Date of Birth	Occupation	Cell Phone
Taxpayer					
Spouse					
	Street Address	City	State	ZIP	Home Phone

Marital Status

- ☐ Married
 ☐ Single
 ☐ Head of Household
 ☐ Married Filing Separately
 ☐ Widow (er), Date of Spouse's Death _____

2. Dependents (Children & Others)

Name	Relationship	Date of Birth	SSN	Months Lived	Disabled	Full Time	Dependent's Gross Income

3. Wage, Salary Income

Attach W-2s:

Employer	Taxpayer	Spouse
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>

5. Dividend Income

From Mutual Funds & Stocks - Attach 1099-DIV

Payer	Ordinary	Capital Gains	Non-Taxable

4. Self-employment Income

	Income	Expense
1099		
1099		
1099		
Net-earning from Self-employed		

6. Interest Income

Attach 1099-IN, FORM 1097-BTC & broker statements

Payer	Amount

7. Did you have healthcare coverage (health insurance) for you, your spouse and dependents? If yes, include Froms 1095-A, 1095-B, and 1095-C.

- ☐ Yes
 ☐ No
 ☐ Partial

Date: _____

Taxpayer Signature