



PLEASE PRINT

Federal Information Worksheet

► Keep for your records

Part I – Personal Information

Taxpayer: Last Name First Name Middle Initial Suffix Social Security No. Occupation Date of Birth (mm/dd/yyyy) or Age as of 1/1/2010 Date of death Legally blind <input type="checkbox"/> E-mail Address Work Phone Ext Cell Phone Home Phone Check to print phone number on Form 1040 <input type="checkbox"/> Home Address Apt No. City State ZIP Code Foreign Country Foreign Phone APO/FPO/DPO address, check if appropriate APO <input type="checkbox"/> FPO <input type="checkbox"/> DPO <input type="checkbox"/>	Spouse: Last Name First Name Middle Initial Suffix Social Security No. Occupation Date of Birth (mm/dd/yyyy) or Age as of 1/1/2010 Date of death Legally blind <input type="checkbox"/> E-mail Address Work Phone Ext Cell Phone Fax Number <input type="checkbox"/> Taxpayer Work <input type="checkbox"/> Spouse Work
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Part II – Federal Filing Status

1 Single

2 Married filing jointly

3 Married filing separately
 Taxpayer did not live with spouse at any time during the year Taxpayer is eligible to claim spouse's exemption (see Help)

4 Head of household
 If the qualifying person is a child but not a dependent:
 Child's name Child's social security number

5 Qualifying widow(er) Year the spouse died ► 2007 2008

Part III – Dependent/Earned Income Credit/Child and Dependent Care Credit Information

First Name	MI	Social Security Number	Date of birth		E I C	Lived with taxpayer in U.S.	Education tuition and fees	Qualified child and dependent care expenses incurred and paid in 2009
			C o d e	Not qualified for child tax credit				
Last Name	Suffix	*Relationship						
-----	-----	-----		<input type="checkbox"/>			<input type="checkbox"/>	
-----	-----	-----		<input type="checkbox"/>			<input type="checkbox"/>	
-----	-----	-----		<input type="checkbox"/>			<input type="checkbox"/>	
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Thank you for taking the time to fill out this information. This will help us verify we have your most recent information. We look forward to serving you! Remember NEW clients receive 10% Discount!

Sincerely,

The Staff