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SMITH FINANCIAL
& ASSOCIATES P.C.

How did you hear about us:______________________ Date:______________

Name: ______________________________ **Spouse Name:** ______________________________

SS#: ______________________________ Spouse SS#: ______________________________

DOB: ______________________ Spouse DOB: ______________________________

Address: ______________________________ City ____________________ St:___ Zip________

Email #1: ______________________________ **Email #2:** ______________________________

DL #: __________________ St: ____ Exp______ Spouse DL: __________________ St: ____ Exp______

Occupation: ______________________________ Occupation: ______________________________

Contact Phone/s: ______________________________ Contact Phone/s: ______________________________

Filing Status: **As of 12/31 of previous year**

_____Married _____Single _____Widowed _____Divorced last year

_____Head of Household (Only if you are not married and have dependents)
_____Married Filing Separately (Not the same as Head of Household)

DEPENDENTS/CHILDREN: (NOT SPOUSE) Can you provide proof of Support YES / NO

Name	Relationship	SS#	DOB

To the best of my knowledge, all information is accurate and true and by signing this form I am releasing this information to Smith Financial & Associates, P.C. (hereafter referred to as SFAPC) for preparation of my return and do not hold SFAPC liable for any penalties and interest due to fraudulent or misleading information. In addition, I authorize SFA to prepare my return and charge the applicable fees. **I also understand that fees will be charged once preparation begins and by signing it is consent to begin preparation.** Our fees are based on the amount of time, difficulty, number of forms, calculations, presentation of information and any other issue that makes it necessary to prepare an accurate return. All invoices for the preparation of your return/s are due and payable upon presentation at time of pickup. No returns will be furnished to you until the balance is paid in full. Returned checks will be charged **$35.00**. If, after preparation of the return is completed by us, and we have notified you of such, and you present additional information there will be an additional minimum charge of **$50.00** for recalculation, processing and copying in addition to the original charges. There will be a Late/Rebilling fee in the amount of **$10.00** charged monthly beginning on the date of completion.

Taxpayer: ______________________________ **Spouse:** ______________________________

NAME:____ _________ DATE:_____________

IF ANSWERS TO ANY OF THESE QUESTIONS ARE APPLICABLE, PLEASE PROVIDE DOCUMENTATION AND/OR A DETAILED ANSWER

Are you current with all Federal Filing requirements? ______
Do you still owe money for any previous years to the IRS? ______
Do you owe any student loans, alimony or to any other federal agency? ______
Did you change jobs during the past year? ______
Did you take any distributions from any retirement plan/s last year? ______
Do you receive any Social Security Income or Disability Income? ______
If you are claiming any dependents, do you have documentation that you have supported the dependent/s for at least half the year and that they lived with you for at least half the year? ______

1. **DID YOU PAY ANY STUDENT LOAN INTEREST? PLEASE PROVIDE STATEMENT?**
2. DID YOU RECEIVE ANY UNEMPLOYMENT COMPENSATION LAST YEAR?
3. **DID YOU OR YOUR SPOUSE MAKE ANY IRA OR ROTH IRA CONTRIBUTIONS?**
4. DID YOU PAY FOR ANY QUALIFIED DAYCARE EXPENSES?
5. **DID YOU MAKE ANY ENERGY EFFICIENT IMPROVEMENTS TO YOUR HOME? (NOT APPLIANCES)**
6. DID YOU HAVE ANY MEDICAL, DENTAL, RX, MEDICAL MILEAGE EXPENSES YOU PAID?
7. **DID YOU PURCHASE A NEW VEHICLE, BOAT, RV, TRAILER, MOTORCYLCE? If so please provide information.**
8. IF YOU HAD A MORTGAGE, PLEASE PROVIDE YOUR MORTGAGE INTEREST AND TAXES PAID (FORM 1098).
9. **ANY CASH DONATIONS OR NON-CASH DONATIONS? PLEASE PROVIDE RECEIPTS**
10. ANY COLLEGE TUITION, FEES, OR BOOKS (1098-T)?

PLEASE PROVIDE LAST YEAR'S TAX RETURN IF YOU ARE NEW TO US.

Your information is confidential and private and will not be shared or sold