

Please bring this printed and filled out form with you to your appointment or, you may save the filled out form and email it to [taxprep@oltax.biz](mailto:taxprep@oltax.biz).

## 1. Personal Information

	Name	Social Security#	Date of Birth	Occupation	Cell#
Taxpayer	_____	_____	_____	_____	_____
Spouse	_____	_____	_____	_____	_____
	Street Address	City	State	Zip	Home Phone#
	_____	_____	_____	_____	_____
Email address(es) _____					
On-line Tax will never sell, trade, give away, or spam your address.					

## 2. Dependents

Name (First, Last)	Relationship	Date of Birth	Social Security#	Months Lived with You	Full-Time Student ✓

## 3. What to Bring with You

**X** the YES box if you have it to bring with you.  
**X** the NO box if you do not.

### YES NO

- Last year's tax return (new clients only)
- Name and address label (from government booklet or card)
- W-2s
- Social Security Cards (of each person & dependent)
- I.R.A. (Individual Retirement Account)
- Pension, Annuity Income (1099-R)
- Interest Income (1099-INT)
- Dividend Income (1099-DIV)
- Investments Sold (1099-B & confirmation slips)
- Other Income (including non-taxable)
- Rental Income (1099-S & closing statements)
- Self-Employment Income (1099)

## 4. Additional Items to Bring

**X** the YES box if you have it to bring with you.  
**X** the NO box if you do not.

### YES NO

- Medical/Dental Expenses
- Taxes Paid
- Mortgage Interest
- Charitable Contributions
- Employment-related Expenses that you paid (Not Self-employed)
- Child & Other Dependent Care Expenses
- Business Mileage
- Business Travel
- Investment-related Expenses

Other Information: \_\_\_\_\_  
 \_\_\_\_\_  
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