Paper Chase Accounting INC.

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# TAX INFORMATION WORKSHEET for TAX YEAR: ______

Mail or Drop off tax documents: 3033 Campus Drive, Ste W110, Plymouth MN 55441

Or call to make an appointment

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Name: ______________________________ Spouse: ______________________________

Occupation: ______________________________ Occupation: ______________________________

email: ______________________________ *Do you check your email daily?* _____

Address: ______________________________ Home Phone: ________________________

______________________________ Cell Phone: ________________________

______________________________ ❐ New Address ❐ New Phone ❐ New email

Dependent Information:

| Full Name | DOB | Grade | *(New clients only)* Social Security | Relationship | #Months lived w/ you |
|---|---|---|---|---|---|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

*New Clients Only*

*Soc Sec #* ________________________

*Birth date:* ________________________

*New Clients Only - Spouse*

*Soc Sec #* ________________________

*Birth date:* ________________________

Please note any questions or comments:

______________________________________________________________________

______________________________________________________________________

______________________________________________________________________

______________________________________________________________________

______________________________________________________________________

______________________________________________________________________

# Questions

Please check the appropriate box and include all necessary details.

| | Yes | No |
|---|---|---|
| **Personal Information** | | |
| Did your marital status change during the year? | ❑ | ❑ |
| If yes, explain:________________________ | | |
| Did your address change from last year? | ❑ | ❑ |
| Can you be claimed as a dependent by another taxpayer? | ❑ | ❑ |
| Will you be using the same bank accounts for your tax refund or payment? | ❑ | ❑ |
| **Dependent Information** | | |
| Were there any changes in dependents from the prior year? | ❑ | ❑ |
| If yes, explain:___________________________________________ | | |
| Do you have any children under age 18 with unearned income in excess of $ 1900? | ❑ | ❑ |
| Did you pay for child care expenses while you worked or looked for work? | ❑ | ❑ |
| **Purchases, Sales and Debt Information** | | |
| Did you start a new business or purchase rental property during the year? | ❑ | ❑ |
| Did you acquire a new or additional interest in a partnership or S corporation? | ❑ | ❑ |
| Did you sell, exchange, or purchase any real estate during the year? | ❑ | ❑ |
| Did you acquire or dispose of any stock during the year? | ❑ | ❑ |
| Did you take out a home equity loan or refinance this year? | ❑ | ❑ |
| Did you sell an existing business, rental, or other property this year? | ❑ | ❑ |
| Did you pay any student loan interest this year? | ❑ | ❑ |
| Did you or your dependents have education expenses (college, university or technical) | ❑ | ❑ |
| **Income Information** | | |
| Did you receive any lump-sum payments from a pension, profit sharing, or 401(k) plan? | ❑ | ❑ |
| Did you make withdrawals from or contributions to an IRA, Keogh, SIMPLE, SEP account? | ❑ | ❑ |
| Did you make any withdrawals from an education savings or 529 Plan account? | ❑ | ❑ |
| Did you receive any disability income during the year? | ❑ | ❑ |
| **Itemized Deduction Information** | | |
| Did you incur a casualty or theft loss during the year? | ❑ | ❑ |
| Do you have evidence to substantiate charitable contributions? | ❑ | ❑ |
| Did you make any noncash charitable contributions (clothes, furniture, vehicles, etc.)? | ❑ | ❑ |
| Did you use your car for job use, other than commuting? | ❑ | ❑ |
| Did you work out of town for part of the year? | ❑ | ❑ |
| Did you have any educational expenses? | ❑ | ❑ |
| Did you have any job search expenses? | ❑ | ❑ |
| Did you make any major purchases during the year (cars, boats, etc.)? | ❑ | ❑ |

## Miscellaneous Information

| | | |
|---|---|---|
| Did you make gifts of more than $ 13,000 to any individual? | ❑ | ❑ |
| Did you make contributions to an education savings or 529 Plan account? | ❑ | ❑ |
| Did you pay long-term health care premiums for yourself or your family? | ❑ | ❑ |
| Are you covered by a pension or retirement plan? | ❑ | ❑ |
| Did you retire or change jobs this year? | ❑ | ❑ |
| Did you incur moving costs because of a job change? | ❑ | ❑ |
| Did you make energy efficient improvements to your primary residence this year? | ❑ | ❑ |
| Did you receive correspondence from the State or the Internal Revenue Service? | ❑ | ❑ |
| Did you have K-12 school expenses? | ❑ | ❑ |
| Did you make estimated tax payments? | ❑ | ❑ |

## Copies of the following items are needed to prepare your tax return

- ❑ (New Clients Only) Previous 2 years tax returns
- ❑ (New Clients Only) Date of Birth & Social Security Number for self & dependents
- ❑ W-2 Statements (W2)
- ❑ Unemployment Income (1099G)
- ❑ Interest and Dividend Income (1099 INT / DIV)
- ❑ Original Purchase Date & Price of Stock sold (if not on brokerage statement)
- ❑ All other 1099 Forms
- ❑ Year- End Investment & Brokerage Statements
- ❑ Social Security Income Statements
- ❑ IRA Contribution & withdraw amounts
- ❑ Medical Expenses
- ❑ Long Term Care Insurance Premium Amount and policy #
- ❑ Property Tax and Real Estate statement
- ❑ Vehicle License Tab renewal cost
- ❑ Mortgage Interest Statements (Form 1098)
- ❑ Charitable Contributions
- ❑ Unreimbursed Employee expenses
- ❑ Rental Property Income and Expenses
- ❑ Student Tuition forms (paid by loan or other)
- ❑ Child Care Expense per child. (Provider name, address & Fed ID#)
- ❑ Canceled Debt (1099C)
- ❑ Estimated tax payment (amount and date)
- ❑ K-12 School Expenses

Additional worksheets are available on our website at www.paperachaseaccounting.com "Online Resources"
Please print out any forms that pertain to your tax situation.
If you do not have internet access, please call to request a paper copy be mailed to you.

All Tax Returns must be paid in full before we are able to e-file. Payments can be mailed or paid online on our website through PayPal. Go to www.paperchaseaccounting.com click Payment at the bottom of the screen then click the "Buy Now" button, and follow the steps.

*PayPal is a widely recognized and long established method for processing online payments. They provide a secure & safe method of payment by credit card, debit card or money transfer.*