

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Social Security # \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

County of Residence \_\_\_\_\_ → Full Year Resident \_\_\_\_\_ Part Year Resident \_\_\_\_\_

Previous State of Residence \_\_\_\_\_ → Date Moved \_\_\_\_\_

Phone home \_\_\_\_\_ work \_\_\_\_\_ cell \_\_\_\_\_

Filing Status \_\_\_\_\_ Occupation \_\_\_\_\_ Email \_\_\_\_\_

*Filing Status information can be found on backside of this page →*

**Spouse**

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Social Security # \_\_\_\_\_ Occupation \_\_\_\_\_

cell \_\_\_\_\_ work \_\_\_\_\_

**Dependents**

Name \_\_\_\_\_ → Male or Female

Social Security # \_\_\_\_\_ Date of Birth \_\_\_\_\_

Name \_\_\_\_\_ → Male or Female

Social Security # \_\_\_\_\_ Date of Birth \_\_\_\_\_

Name \_\_\_\_\_ → Male or Female

Social Security # \_\_\_\_\_ Date of Birth \_\_\_\_\_

**Health Insurance** Full Yr \_\_\_\_\_ or Part Yr \_\_\_\_\_ → Dates of coverage \_\_\_\_\_

Coverage through → Employer / Private / Marketplace (please provide Form 1095-A)

**STANDARD TAXPAYER EXPENSES & DEDUCTIONS** - ( Please fill out any that apply or leave blank if not applicable)

**Day Care Expenses** (cost of paying someone to care for your child, spouse or dependent): \_\_\_\_\_

**Higher Education Expenses** (cost of tuition , fees or other expenses related to you, your spouse or a dependent attending a university, college, technical school, etc.): \_\_\_\_\_

**Business Expenses** (the ordinary and necessary costs of carrying on a for-profit trade or business): \_\_\_\_\_

**Moving Expenses** (cost of move due to change in job or business location): \_\_\_\_\_

**IRA/ROTH Contribution** (payment to an Individual Retirement Agreement): \_\_\_\_\_

**Hybrid Vehicle** (purchase of plug-in hybrid-electric vehicles in or after 2010): \_\_\_\_\_

**Mortgage Refinancing** (new mortgage to replace the original to obtain a different interest term and rate): \_\_\_\_\_

**Energy Credit** (cost of energy-efficient home improvements): \_\_\_\_\_

## **FILING STATUS**

**Single Filing Status** - Single filing status generally applies if you are not married, divorced or legally separated according to state law.

**Married Filing Jointly** - A married couple may file a return together using the Married Filing Jointly status.

**Married Filing Separately** - If a married couple decides to file their returns separately, each person's filing status would generally be Married Filing Separately.

**Head of Household** - The Head of Household status generally applies if you are not married and have paid more than half the cost of maintaining a home for yourself and a qualifying person.