

**MA Barker Bookkeeping Tax Service  
Tax Preparation Intake Sheet**

Personal Information			
1	Your Full Name as it Appears on your Social Security Card		
2	Spouses Full Name as it Appears on Social Security Card		
3	Your filing status on last year's return (s,mfj,mfs,hh,qw)		
4	Your Address, Street, City, State and Zip Code		
5	Your Social Security Number		
6	Spouses Social Security Number		
7	Your Telephone Number	( )	
8	Full Name, Date of Birth and Social Security Number and relationship of each Dependent (Please bring Social Security cards to interview)	DOB	SS No. Relationship
9	Current Year Filing Status (Check one)		
	Single		
	Married Filing Joint		
	Married Filing Separate		
	Head of Household		
	Qualifying Widow(er)		
10	Your Date of Birth		
	Spouses Date of Birth		
11	Your Occupation and Daytime Phone Number		( )
	Spouses Occupation and Daytime Phone Number		( )
12	Check All That Apply for Last Year and This Year	Last Year	This Year
12a	Could Your or Your Spouse be claimed as a dependent on someone else's return?		
12b	Served in the Armed Forces, (active, reserve or National Guard)		
12c	Permanently and totally disabled		
12d	Legally blind as of December 31		
12e	Filer died before filing return	Date of Death	
INCOME			
13	Number of Forms W-2's for all jobs held during tax year		Please attach forms
14	Number of Forms 1099 from banks, or brokers, rentals, royalties, or misc. (1099INT, 1099B, 1099DIV, 1099MISC, etc)		Please attach forms
15	Number of Forms 1099 from Retirement or Social Security, or Gov't. (SSA-1099, RRB-1099, 1099R, 1099SS, 1099G)		Please attach forms
16	Income and Expenses from your own business or odd jobs		Please attach recap
17	Income and Expenses from a partnership (Form K-1)		Please attach forms
18	Did you receive wages not reported on a W-2		
	Example, Household, Sick or Disability Pay, Excess Salary Deferred, Foreign wages?		
19	Did you sell shares in an Employees Stock Purchase Plan (ESPP) Y/N		Please attach forms
20	Did you participate in any kind of Employee Stock Plan?		
21	Did you sell any stocks or bonds or mutual funds? If so attach 1099-B		
22	Did you have any "Capital Loss Carryovers" from previous Years?		

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23	List any interest received not reported on a 1099INT	
24	Did you receive any tax exempt dividends? If so list	
25	Did you have an interest in a foreign account or receive a distributions from a foreign trust? Y/N	
26	Did you receive a state tax refund last year? (May be on 1099G) If not list amount	
27	Did you pay any state tax last year for a prior year return?	
28	Did you receive or repay any nongovernmental unemployment benefits during the tax year?	
29	Do you need to report income from any of the following sources?	
29a	Business (Schedule C)	
29b	Rental or Royalty Property (Schedule E)	
29c	Farm (Schedule F)	
29d	Farm Rental Property (Form 4835)	
30	How much did you contribute to a Regular IRA for the tax year?	
31	Did you have any money in a ROTH IRA?	
32	Do you intend to open a ROTH IRA by April 15?	
33	Did you sell your main home during the tax year?	
34	Are you 70 1/2 and required to take minimum required distribution?	
35	Did you receive alimony, or spousal support from a former spouse?	
36	Did you receive any taxable scholarship, fellowship, grant or stipend income not already reported above?	
37	Did you receive jury duty pay? If so how much?	
38	Did you receive any other income not mentioned above?	
39	Did you receive any foreign earned income?	
40	Did you have a child under the age of 14 with \$1,800 in earnings?	

**DEDUCTIONS**

<b>I will need information on the following:</b>		<b>Information Attached or Entered</b>
41	Moving expenses and job related expenses	
42	Alimony paid	
43	Clean fuel or electric vehicle purchases	
44	Student loan interest and education expenses	
45	Federal, state and local taxes not reported on W2 or 1099	
46	Casualty and theft losses	
47	Mortgage interest and property tax expenses	
48	Charitable contributions, cash and noncash (Provide List)	
49	Medical expenses (Provide List)	
50	Child and dependent care expenses(Provide caregiver name, address & TIN)	
51	Payments made to household employees	
52	<b>Copy of your previous year tax return</b>	

Additional Information or Comments


I (We) understand that this tax return is prepared based on information provided and to be best of my (our) knowledge is true and correct.

Signature of Taxpayer: \_\_\_\_\_ Date: \_\_\_\_\_

Signature of Taxpayer: \_\_\_\_\_ Date: \_\_\_\_\_