

6. Income		
Did you have any wages or contract income?	Yes or No	If yes, please provide copies of W2 or 1099-Misc
Did you have any debts cancelled, forgiven or refinanced?	Yes or No	If yes, please provide copies of 1099-C
Did you receive rental income from real estate or other property owned?	Yes or No	If yes, please provide a report of your income and expenses
Did you receive any distribution from retirement income?	Yes or No	If yes, please provide copies of 1099-R and/or 5498
Did you receive interest and dividends	Yes or No	If yes, please provide copies of 1099-INT and 1099-DIV
Did you sell any investments (stock, bonds, partnership interest) in 2011?	Yes or No	If yes, please provide copies of 1099-B and confirmation stmts
Did you receive any compensation from a merchant services? (Ebay, Paypal, Etc.)	Yes or No	If yes, please provide copies of 1099-K
Did you receive any income from a partnership, trust or estate?	Yes or No	If yes, please provide copies of Schedule K-1

7. Other Income		8. Itemized Deductions	
List All Other Income (including non-taxable) Please provide documentation of all other income amounts		Are you itemizing your deductions? <input type="checkbox"/> Yes or No If no, skip this section	
Please provide documentation of all deductions		Please provide documentation of all deductions	
Alimony Received	Yes or No	Medical and Dental Expenses	Yes or No
Child Support	Yes or No	Real Estate Taxes Paid	Yes or No
Scholarship (Grants)	Yes or No	Personal Property Taxes	Yes or No
Unemployment Compensation	Yes or No	Other Taxes Paid (sales tax)	Yes or No
Prizes, Bonuses, Awards	Yes or No	Mortgage Interest	Yes or No
Gambling , Lottery	Yes or No	Investment Interest	Yes or No
Unreported Tips	Yes or No	Prem. For Qualified Mortgage Ins.	Yes or No
Director/Executor Fees	Yes or No	Points Paid	Yes or No
Commissions	Yes or No	Casualty Theft Losses	Yes or No
Jury Duty	Yes or No	Charitable Contributions	Yes or No
Workers Compensation	Yes or No	Non-Cash Contributions	Yes or No
Disability Income	Yes or No	Charitable Miles	Yes or No
Veterans Pensions	Yes or No	Employment Expenses You Paid	Yes or No
Payments from prior installment plans	Yes or No	Investment Related Expenses	Yes or No
State Tax Income Refund	Yes or No	Other _____	
Other _____		Other _____	
Other _____		Other _____	

9. Self Employed Business	
Do you own your own business?	<input type="checkbox"/> Yes or No
if no, skip this section	
What is the name of the business?	_____
What is the EIN for the business?	_____
Entity Type	Sole Prop Single LLC Partnership S-Corp circle one
What is the product or service your business provides?	_____
How many years have you been in business?	_____
<i>Please provide detail of the business income and expenses, a profit and loss statement is acceptable. If you require assistance with compiling the profit and loss statement, additional accounting services will apply.</i>	

10. Estimated Tax Payments

Did you make any estimated tax payments in 2011?

 Yes or No*if no, skip this section*

Due Date	Date Paid	Federal Amount	State Amount

11. Direct Deposit of Refund (if applicable)

If your return qualifies for a refund, do you want the refund directly deposited into your account?

 Yes or No*The IRS allows you to deposit your federal tax refund into up to three different accounts. Please provide the following information:***Account 1**

Name of Financial Institution _____

Type of Account: checking or savings (circle one)

Financial Institution Route Number _____

Taxpayer Account Number _____

Account 2

Name of Financial Institution _____

Type of Account: checking or savings (circle one)

Financial Institution Route Number _____

Taxpayer Account Number _____

Account 3

Name of Financial Institution _____

Type of Account: checking or savings (circle one)

Financial Institution Route Number _____

Taxpayer Account Number _____

12. Tax Preparation Payment Options

If you have chosen to have your refund direct deposited into your account, you have the option to have the tax preparation fees deducted from your refund for a nominal fee (see payment options information below).

Would you like to have the tax preparation fees deducted from your refund?

 Yes or No

Please provide the following information for processing the deduction:

**** If filing jointly both taxpayer and spouse info required****Taxpayer**

Drivers License ID # _____

State _____ Exp. Date _____

Spouse

Drivers License ID # _____

State _____ Exp. Date _____

Payment Option Information

The bank product allows your refund to be processed in 7-10 business days. Refund options are checks processed in office, direct deposit, or Visa debit card. The charge for these services are \$20 for check, \$10 Direct Deposit, \$5 Debit Card

Contact our office if you have any questions or concerns**World Wide Tax Services**

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