



Claudia Johnston

Tax & Bookkeeping Services

2770 North FM 565
Mont Belvieu, TX 77523

(281) 576-2145

cjohnstontax@yahoo.com

2010 Individual Income Tax Information Sheet

This form is designed to assist you in compiling the information necessary to accurately prepare your income tax return.

Completing this form and returning it when you drop off your tax information will greatly expedite your filing process.

**PLEASE PROVIDE ALL DOCUMENTS
THAT SAY "IMPORTANT TAX
INFORMATION" ON THE ENVELOPE!**

Taxpayer _____ Social Sec # _____ DOB _____ Occupation _____

Spouse _____ Social Sec # _____ DOB _____ Occupation _____

Mailing Address _____

Home Phone _____
Cell Phone _____
Email Address _____

Filing Status () Single () Married Filing Joint () Head of Household () Widow/Widower
(Check One) () Married Filing Separately* * Spouse Name & SS#: _____

DEPENDENT INFORMATION

First	M.I.	Last	Relation	DOB	SS#

Would you like to have your return EFILED? () Yes () No

Would you like to have your refund direct deposited? () Yes () No

Direct Deposit Info

Bank Name: _____
Routing Number: _____
Account Number: _____
() Checking () Savings

PLEASE PROVIDE ALL DOCUMENTS THAT SAY "IMPORTANT TAX INFORMATION" ON THE ENVELOPE!

1099s

1099 - B Stock Sales
 1099 - C Cancellation Of Debt
 1099 - Div Dividends Received From Investments
 1099 - G Unemployment Compensation
 1099 - Int Bank Interest Earned
 1099 - Misc Miscellaneous & Contract Labor Income
 1099 - R Retirement & Pension Distributions
 1099 - S Proceeds From Real Estate Sales

W2s

W2 Wage Income
 W2 - G Gambling Winnings

1098s

1098 Mortgage Interest Paid
 1098 - E Student Loan Interest
 1098 - T Tuition Statement

Social Security Income

SSA - 1099 Benefits Statement

K-1s

1041 Trust/Estate Income
 1065 Partnership Income
 1120-S Shareholder Income

**** By signing this form, I declare that I have provided all information to the best of my knowledge and belief, it is true, correct, and complete****

Taxpayer or Spouse's Signature _____

Date _____

Real Estate Sales/Purchases

Bring Closing Statements from any Purchase or Sale.

Deductible Teacher Expenses

Amount _____ (\$250 Max)

Stock Sales

Name of Stock	# of Shares	Date Bought	Date Sold	Purchase Price	Sale Price

Quarterly Estimated Tax Payments Made

Due	Date Paid	Amt Paid	Check #
Credit Applied from 2009 Return			
4/15/2010			
6/15/2010			
9/15/2010			
1/15/2011			

IRA Contributions Made

Taxpayer: Traditional _____ Roth IRA _____
 Spouse: Traditional _____ Roth IRA _____

Medical & Dental Expenses (Paid By You)

Insurance Premiums _____
 Total Doctor/Dental/Hospital Visit Charges _____
 Total Medical Supplies(glasses, hear aids, etc) _____
 Total Prescription Drug Charges _____
 Total Medical Miles Driven _____

Taxes Paid

Real Estate Taxes Paid On Your Home _____
 Other Real Estate Taxes (not on rental property) _____
 Sales Tax Paid On Major Purchases (Autos, Boats, Etc)
 Item: _____ Tax Paid: _____
 Item: _____ Tax Paid: _____

Charitable Contributions Made

Cash or Check: _____
 Goodwill/Salvation Army Donations: _____
 Non-Cash Contributions: _____
 (Must bring receipt for non-cash over \$500)

Other Deductions

Tax Preparation Fee Paid _____
 Union or Professional Dues _____
 Investment Expenses _____
 Safety Deposit Box Rental Fee _____

Child Care Credit Information

Child Care Provider's Name	Address	SSN or EIN #	Amount Paid	Child Cared For

SELF-EMPLOYED

Business Name _____

Business Address _____

Type of Business Activity _____

Began or Acquired Business this year? () Yes () No

Accounting Method () Cash () Accrual () Other (specify) _____

Income

Gross Receipts or Sales _____
Returns & Allowances _____

Expenses

Advertising _____
Commissions & Fees _____
Contract Labor _____
Employee Benefit Programs _____
Insurance (other than health) _____
Interest:
 Mortgage _____
 Other _____
Legal & Professional Services _____
Office Expenses _____
Pension & Profit Sharing Plans _____
Rent or Lease:
 Equipment _____
 Vehicles _____
 Office _____
 Other _____
Repairs & Maintenance _____
Supplies _____
Taxes & Licenses _____
Travel _____
Meals & Entertainment _____
Utilities _____
Wages (reported on W2s) _____
Other Expenses:
 Continuing Education _____
 Business Telephone _____
 Business Cell Phone _____
 Bank Fees _____
 Credit Card Fees _____
 Dues & Publications _____
 Uniforms _____
 Website & Internet _____
 Public Relations _____

Cost of Goods Sold

Beginning Inventory _____
Purchases (For Resale) _____
Contract Labor _____
Materials & Supplies _____
Ending Inventory _____

Business Auto Mileage

Vehicle # 1
Date Put In Service _____
Business Miles _____
Commuting Miles _____
Personal Miles _____
Total Miles Driven _____

Vehicle # 2
Date Put In Service _____
Business Miles _____
Commuting Miles _____
Personal Miles _____
Total Miles Driven _____

Home Office

Date Purchased: _____
Amount Paid: _____
Total Sq. Ft _____
Bus. Use Sq. Ft. _____
Hours used per day for Business _____

Mortgage Interest _____
Real Estate Taxes _____
Home Insurance _____
Repairs _____
Improvements _____

Electricity _____
Gas _____
Garbage _____
Water _____
Total Utilities _____

Major Purchases - Capital Expenses

Item Bought	Date	Cost
Item Bought	Date	Cost
Item Bought	Date	Cost

RENTAL INCOME WORKSHEET

Property # 1 Address _____
 Property # 2 Address _____
 Property # 3 Address _____
 Property # 4 Address _____
 Property # 5 Address _____
 Property # 6 Address _____

	#1	#2	#3	#4	#5	#6
TOTAL RENTS RECEIVED						
ROYALTIES						

Advertising						
Cleaning & Maintenance						
Lease fees / Commissions						
Insurance						
Legal and Accounting						
Management/HOA Fees						
Interest - Mortgage Interest						
Other Interest						
Repairs - Misc.						
Supplies						
Taxes						
Utilities						
Other: (List)						
Oil Depletion						
Major Purchase - Capital Expense	Item bought			Date Bought	Cost	
(Appliances, improvements, etc)						

Rental Auto Mileage

Vehicle # 1	_____	Vehicle # 2	_____
Date Put In Service	_____	Date Put In Service	_____
Rental Use Miles	_____	Rental Use Miles	_____
Commuting Miles	_____	Commuting Miles	_____
Personal Miles	_____	Personal Miles	_____
Total Miles Driven	=====	Total Miles Driven	=====

Client Information Privacy Policies

The Federal Trade Commission has issued regulations that require tax preparation firms to provide an annual statement of firm privacy policies. Here is my policy:

I handle all information you provide with the utmost confidentiality. It has always been my policy to keep all information that I collect from you confidential from all sources. Your personal information will only be shared with members of my firm who need to know this information in order to complete the work you have hired my firm to do. We will not disclose your personal information to anyone outside our firm without your express permission to do so, or unless we are legally required to do so. For example, if a mortgage lender contacts my office for a copy of your return or information about it, I will ask that you provide permission to me prior to my responding to that request.

You should also be aware that anything you tell me during the interview for the preparation of your tax return is confidential, but not protected from the IRS. Privileged communications (those that are protected from IRS authority to compel my testimony) are limited to non-criminal tax advice on matters before the IRS or non-criminal tax proceedings in federal courts. Although I consider any information you provide me as confidential, return preparation services are not covered by advisor-client privilege. This means that in criminal proceedings, our conversations are not protected. If you feel the nature of any subject matter to be discussed requires protected communications, please raise that issue so that we can discuss your possible need to consult with an attorney for legal advice.

Referrals are the cornerstone of any service business. I rely on satisfied clients as the primary source of new business. Your referrals are both welcome and most sincerely appreciated. Since your referrals are generally individuals you are well acquainted with you can be assured that your personal, financial, and tax data will not be shared with them.

Thank you for allowing my firm to be of service!