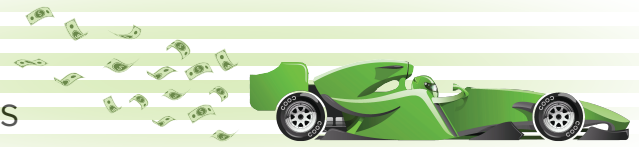


# WELCOME TO PUMA ACCOUNTING!

To make it easier for you and meet your tax preparation expectations, take some time to fill out this information below as honestly and accurately as possible. Providing all forms and paperwork will assist in a speedy process. Please call us if you have any questions during your income tax filing process.

## DROP OFF, SCHEDULE & GO!

SAVE TIME & MONEY WHEN FILING YOUR INCOME TAXES



Are you a returning Puma Accounting Client?  Y |  N

If yes, do you have a preferred Tax Specialist? (please provide name): \_\_\_\_\_

What date would you like for your return to be ready by?: \_\_\_\_\_

### CLIENT INFORMATION:

Primary Taxpayer Name: \_\_\_\_\_

Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_ SS# or ITIN: \_\_\_\_\_

Occupation: \_\_\_\_\_

Physical Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Preferred Contact:  Email |  Phone |  Text

Best Phone Number: (\_\_\_\_) \_\_\_\_-\_\_\_\_

Email: \_\_\_\_\_

Marital Status:  Single |  Married |  Widowed

Can you be claimed as a dependent by someone else?  Y |  N

Are you an active member or the spouse/dependent of an active member of the military?  Y |  N

Spouse Name: \_\_\_\_\_

Spouse Date of Birth: \_\_\_\_\_

Spouse SSN# or ITIN: \_\_\_\_\_

Occupation: \_\_\_\_\_

Physical Address (if different): \_\_\_\_\_

\_\_\_\_\_

Best Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_

### DEPENDENTS\* (or people living in your household)

Name	Relationship	Date of Birth	SSN# or ITIN (new clients only)	Full-Time Student	Disabled?

\*If any dependents listed did not live at the primary taxpayer's address the entire year, please discuss this with your tax specialist. This is critical to help you accurately report your residency and dependency to the tax authorities.

## CHECKLIST:

### DOCUMENTS & FORMS

more details on reverse side of page...

#### INCOME:

- Employer (W-2)
- Self Employment\*
- Interest (1099-Int)
- Social Security (SSA-1099)
- Retirement plan distribution \* (1099-R)
- Dividends (1099-Div)
- Rental Property
- Stock or Mutual Fund sale (1099-B)
- Unemployment

#### EXPENSES:

- Self Employment\*
- Un-reimbursed by your employer
- Education
- Rental Property\*
- Medical/Dental care
- Union Dues

#### CREDITS & DEDUCTIONS:

- Donate cash or goods to charity?
- Pay Student Loan interest?
- Pay Child/Dependent Care expense?
- Have a Mortgage Payment? (1098)
- Make and IRA Contribution?
- Make a major taxable purchase?
- Pay Property Taxes?
- HSA Contribution?

#### HEALTH INSURANCE:

(Check all that apply & include documents)

- Where you or any member of your household:
  - Covered by a qualified employer, private or government health insurance plan?
  - Enrolled in a health insurance plan through the federal or state marketplace?

#### MISCELLANEOUS\*:

(Check all that apply)

- Sell a home?
- Pay/Receive alimony?
- Adopt a child?
- Suffer catastrophic loss?
- Have gambling winnings/losses?
- Change in marital status?

\*If this applies, we recommend you meet with a Puma Accounting tax specialist to discuss your tax situation before dropping off your information and documents.

**IMPORTANT: IT IS YOUR RESPONSIBILITY TO SUBMIT ALL TAX DOCUMENTS PROPERLY. HAVE A QUESTION? CALL US!**

## FILER(S) INFORMATION

### PERSONAL

- Your social security number (SSN) or tax ID#
- Your spouse's full name and SSN or tax ID#

### DEPENDENT(S)

- Dates of birth and social security numbers or tax ID#
- Childcare records (including the provider's tax ID#)
- Income of other adults in your home
- Form 8332: child's custodial parental rights release

### SOURCES OF INCOME

#### EMPLOYED

- ALL W-2 Forms

#### UNEMPLOYED:

- Unemployment, state tax refund (1099-G)

#### SELF-EMPLOYED FORMS

- 1099
- Schedules K-1
- Income records to verify amounts not reported on 1099s
- Records of all expenses
- Invoices & Receipts
- Check registers
- Credit card statements and receipts
- Business-use asset information for depreciation
- Office in home information, if applicable
- Record of estimated tax payments made (Form 1040-ES)

#### RENTAL INCOME

- Records of income and expenses
- Rental asset information for depreciation
- Record of estimated tax payments made (Form 1040-ES)

#### RETIREMENT INCOME

- Pension/IRA/annuity income (1099-R)
- Traditional IRA basis
- Social security/RRB income (1099-SSA, RRB-1099)

#### SAVINGS & INVESTMENTS OR DIVIDENDS

- Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- Income from sales of stock or other property (1099-B, 1099-S)
- Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)
- Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- Expenses related to your investments
- Record of estimated tax payments made (Form 1040-ES)

#### OTHER INCOME & LOSSES

- Gambling income (W-2G or records showing income & expense records)
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Trusts
- Royalty Income 1099-Misc.
- Any other 1099s received
- Record of alimony paid/received with ex-spouse's name & SSN

## TYPES OF DEDUCTIONS

### HOME OWNERSHIP

- Forms 1098 or other mortgage interest statements
- Real estate and personal property tax records
- Receipts for energy-saving home improvements
- All other 1098 series forms
- Charitable Donations
- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Amounts of miles driven for charitable or medical purposes

### MEDICAL EXPENSES

- Amounts paid for healthcare insurance & to doctors, dentists, hospitals

### HEALTH INSURANCE

- Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)
- Form 1095-B and/or 1095-C if you had insurance coverage through any other source (e.g., an employer, insurance company, or government health plan such as Medicare, Medicaid, CHIP, TRICARE, VA, etc.)
- Marketplace exemption certificate (ECN) if you applied for and received an exemption from the Marketplace (Exchange)

### CHILDCARE EXPENSES

- Fees paid to a licensed day care center or family day care for care of an infant or preschooler
  - Wages paid to a baby-sitter
- Don't include expenses paid through a flexible spending account at work*

### EDUCATIONAL EXPENSES

- Forms 1098-T from educational institutions
- Receipts that itemize qualified educational expenses
- Records of any scholarships or fellowships you received
- Form 1098-E if you paid student loan interest

### K-12 EDUCATOR EXPENSES

- Receipts for classroom expenses (for educators in grades K-12)

### STATE & LOCAL TAXES

- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Invoice showing amount of vehicle sales tax paid

### RETIREMENT & OTHER SAVINGS

- Form 5498-SA showing HSA contributions
- Form 5498 showing IRA contributions
- All other 5498 series forms (5498-QA, 5498-ESA)

### FEDERALLY DECLARED DISASTER

- City/county you lived/worked/had property in
- Records to support property losses (appraisal, clean up costs, etc.)
- Records of rebuilding/repair costs
- Insurance reimbursements/claims to be paid
- FEMA assistance information
- Check FEMA site to see if my county has been declared a federal disaster area

## TAX SPECIALIST OR CLIENT SERVICES PROFESSIONAL TO COMPLETE SECTION BELOW:

Please follow ALL steps

Client received the Privacy Policy:  Y      Client Reviewed and signed the Client Service Agreement:  Y

Is the client interested in Refund Transfer?:  Y |  N      If Yes, has the client reviewed and signed the Consent to use?  Y |  NA

How would the client like to review and approve their tax return?  Approve Online |  Return to Office

**If Approval Online is selected, you must verify Tax payer and Spouse (if applicable) unexpired government-issued photo ID**

Taxpayer ID Type:  Exp Date:

Taxpayer ID Number:

Place of Issuance, if any

Date of Issuance if any

Spouse ID Type:  Exp Date:

Spouse ID Number:

Place of Issuance, if any

Date of Issuance if any