FREEMAN & COMPANY
CHESTER COUNTY TAX CONSULTANTS
Accounting • Tax Consulting • Tax Return Preparation
Individual • Partnership • Corporate

2013 Tax Year Client Data Sheet

Today's Date: ____________________

	Taxpayer	**Spouse**
Name:	______________	______________
Social Security #:	______________	______________
Occupation:	______________	______________
Date of Birth:	______________	______________
Phone, home:	______________	
Phone, work:	______________	______________
Phone, cell:	______________	______________
Email:	______________	______________

Mailing Address: ______________________________

City, State, Zip: ______________________________

Township: ______________________________

County: ______________________________

First year filing with Freeman & Company? □ Yes □ No
New clients, please provide prior year tax return
How did you hear about us? ______________________________

Filing Status
□ Single
□ Married Filing Jointly
□ Married Filing Separately
□ Tax payer did not live with spouse at any time during year
□ Tax payer eligible to claim spouse's exemption
□ Head of Household, if qualifying person is child, but not dependent:
Name: ______________________ SSN: ____________________
□ Qualifying Widow(er) – year spouse died: □ 2012 □ 2011

List all dependents:

Name: ________________ Birth date: ____________ SSN: ______________ □ M □ F

Name: ________________ Birth date: ____________ SSN: ______________ □ M □ F

Name: ________________ Birth date: ____________ SSN: ______________ □ M □ F

Name: ________________ Birth date: ____________ SSN: ______________ □ M □ F

Do you have child care expenses? □ Yes (Need provider name, amount, address & Tax ID #) □ No

- Do you have dependent care via W-2 (employer provided)? □ Yes □ No

Did you or your dependent(s) attend college in 2013? □ Yes □ No

- How many years of college were completed by student as of 1/1/2013? ____________

Did you buy or sell a home in 2013? □ Yes (Need HUD/Settlement sheets) □ No

Did you refinance in 2013? □ Yes (Need HUD/Settlement sheets) □ No

Are your taxes paid through Escrow? □ Yes □ No (Need tax bills)

Did you live in PA all of 2013? □ Yes □ No (State moving from: ________ Date of move: __________)

- What school district do you live in? ____

Do you own a rental property? □ Yes □ No

Are you self employed? □ Yes (Please provide bank statements) □ No

- Are you self employed as a: □ Sole Proprietor □ LLC □ C-Corp □ S-Corp

Do you have a home office? □ Yes □ No

- Are your work related expenses paid by employer? □ Yes □ No

Did you sell stocks, bonds or mutual funds? □ Yes □ No

- If you sold stocks, we need your cost basis (let us know if you don't have this or are unsure)

If you receive a refund, do you want it direct deposited? □ Yes (please provide voided check) □ No

The following items must be provided to complete your tax return:

√ Local Tax Form
√ All W-2 Forms
√ Any 1099 Forms
√ 1098 Forms (mortgage interest/taxes paid)
√ Tax bills (if not on 1098)
√ 1099B Forms (interest/dividends)
√ 1099B Forms (stocks sold or capital gain/mutual funds)
√ Medical expenses (if greater than 10% of gross income)
√ Letters or canceled checks of any charitable contributions

By signing below, you understand that all fees are due upon delivery, cash or check only:

Signature: __________________________ Printed Name: __________________________ Date: _________

Signature: __________________________ Printed Name: __________________________ Date: _________