



LIBERTY TAX BLOCK CLIENT DATA SHEET

This form assists us in gathering your income tax information.

WE MAY REQUEST A COPY OF YOUR LAST YEAR'S RETURN.

You will be asked to provide all tax forms necessary to complete an accurate income tax return.

HOW DID YOU HEAR ABOUT US? (circle all that apply)
Radio Penny Saver LTB waiver Local Paper Flyers Leaflets Friend/Family

PRIMARY TAXPAYER'S INFORMATION

Previous Year Tax Return Filed (Circle if Yes) 2012 - 2013

Name _____

Address _____

City _____ State _____ Zip _____

Home Phone _____

Can someone else claim you as a dependent? ☐ Yes ☐ No

Social Security Number _____

Occupation _____ Date of Birth _____

Email _____

Cell Phone _____

SPOUSE'S INFORMATION

Name _____

Email Address _____

Home Phone _____

Social Security Number _____

Occupation _____ Date of Birth _____

Cell Phone _____

DEPENDENT INFORMATION

Dependent's Name(s) List youngest dependent first	Birthdate	Social Security Number(s)	Relationship	Months of the yr lived in home	College Student? Yes/No	Disabled? Yes/No
1.						
2.						
3.						
4.						

If your child did not live with you but you are claiming them as your dependent, check here:

☐ Custodial parent must sign Form 8332

INCOME INFORMATION - Check items that apply

- ☐ Wage Statement W-2's
☐ Interest
☐ Dividends
☐ Commission's - 1099's
☐ Unemployment
☐ Pension, Retirement Income
☐ Partnership/S Corporation (K-1)
☐ Estates/Trusts
☐ Lottery or Gambling Winnings
☐ 1099-S, 1099-A, 1099-C

Adjustments/Miscellaneous Deductions

- ☐ SSI / Railroad Retirement
☐ Municipal Bonds
☐ Tips/Other Income
☐ Alimony
☐ Stock Sales
☐ Educator Expenses (non-reimbursed) \$ _____
☐ Alimony Paid \$ _____
☐ IRA Contributions T: \$ _____ S: \$ _____
☐ Gambling Losses \$ _____
☐ Moving Expenses (for employment purposes)
Miles: _____ Fuel: \$ _____ Storage: \$ _____
Moving Cost: \$ _____

Are you self-employed? ☐ Yes ☐ No ☐ 1099-MISC
Do you own rental real estate? ☐ Yes ☐ No

☐ Travel & Lodging: \$ _____
Student Loan Interest Paid \$ _____

HIGHER EDUCATION EXPENSES

☐ Taxpayer ☐ Spouse ☐ Dep 1 ☐ Dep 2 ☐ Dep 3 ☐ Dep 4 ☐ Taxpayer ☐ Spouse ☐ Dep 1 ☐ Dep 2 ☐ Dep 3 ☐ Dep 4

School attended _____ School attended _____
College year: _____ College year: _____
Expenses reported on Form 1098-T: YES ☐ NO ☐ Expenses reported on Form 1098-T: YES ☐ NO ☐
Tuition: _____ Books: _____ Tuition: _____ Books: _____
(You must have receipts/cancelled checks if you do not have Form 1098-T)

CHILD CARE PROVIDER'S INFORMATION

Provider's Name _____ Provider's Address _____ SSN/EIN _____ Phone # _____

If more than one child, please indicate year-round cost for each child separately: 1st Child \$ _____ 2nd Child \$ _____ 3rd Child \$ _____

Primary Taxpayer's Signature _____

Date _____

Spouse's Signature _____

Date _____

By filling out this form, signing and returning it to Liberty Tax Block electronic services, you agree to include all accurate supporting documents to our tax accounting services, Inc. Also, Liberty Tax Block for the sole purpose of completing your income tax forms. Please email all forms to connect@libertytaxblock.com with subject: Full name, ID#s. Liberty Tax Block will not assume any responsibility or liability for falsified IRS, income tax supporting documents or verbal falsifications. By having Liberty Tax Block complete a tax return for you, you agree to provide accurate, truthful and current information and documents. Anything not complying with this will void any responsibility to Liberty Tax Block. You agree to hold the company, its employees, partners and affiliates harmless and not liability for any fees, penalties and fees incurred in the future by falsified documents presented to Liberty Tax Block or it's personnel.

Liberty Tax Service Client Data Sheet

M Tight



Liberty Tax Service Client Data Sheet:

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