2019
PERSONAL AND INCOME INFORMATION WORKSHEET
Must Be Filled In as Completely as Possible
(Use Your 2018 Return as a Guide)

Your Name ______________________________ Your Social Security Number ____________________
First MI Last

Spouse's Name ______________________________ Spouse's Social Security No ____________________
First MI Last

Address: ____
Street City State Zip

TELEPHONE NUMBERS (please include area code) Home ____________ Your Work ____________ Spouse's Work ____________

CELL PHONE NUMBERS (please include area code) Yours ____________ Spouse's ____________

OCCUPATIONS - Yourself ____________________ Your Spouse ____________________

DATE OF BIRTH - Yourself ____________ Your Spouse ____________ Email address: ____________________
MO DAY YEAR MO DAY YEAR

Registered domestic partners check here. ☐ **If entire family covered by health insurance all year check here.** ☐ **Did you own or spend any Virtual Currency in the calendar year?** ☐ **At anytime throughout the year, did you have more than $10,000 in a Foreign Bank Account?** ☐

DEPENDENT INFORMATION Full Name	Date of Birth	Social Security Number	Relationship	Months Lived in Your Home in 2019

Do you want any refunds due you directly deposited to your checking or savings account? ____Yes ____No If yes, is the information provided last year still accurate? ____Yes ____No (If no, we need current routing number and account number)
(Please Bring all W-2s, Forms 1099 and Other Documents Indicating Income Received)

1. Total **WAGES** earned: (optional - we will add this up for you) $ ____________ **2. TIPS RECEIVED** but not reported to your employer: $ ____________

3. INTEREST INCOME: (Please bring Forms 1099 or Year End Statements)

If you received interest income from a seller financed mortgage in 2019, bring name, address & social security number of payer—this is an IRS requirement.

Payer's Name	Amount	Payer's Name	Amount

Early Withdrawal Penalties: $ ____________ **Tax Exempt Interest:** $ ____________ **(Bring Statements)**

4. **DIVIDEND INCOME:** (Please bring Forms 1099 or Year End Brokerage Statements)

Payer's Name	Gross Dividends	Payer's Name	Gross Dividends

5. ALIMONY RECEIVED: $ ____________. **ALIMONY PAID:** $ ____________ - SSN of Person the Alimony was Paid to - ____________________

6. UNEMPLOYMENT COMPENSATION RECEIVED: $ ____________

7. SOCIAL SECURITY PAYMENTS received: Yourself $ ____________ Your Spouse $ ____________

8. If you **SOLD** stocks, real estate or other assets in 2019, bring all pertinent papers. If you had **STOCK TRANSACTIONS**, please bring brokerage buy and sell slips or a detailed listing. **We need to know when you bought the stock and how much you paid for the stock!**

9. MISCELLANEOUS INCOME not shown elsewhere - **SOURCE:** ____________________**Amount: $** ____________

10. I have an ☐ **IRA** or a ☐ **Keogh Plan**. How much paid in 2019? $____________ How much paid in 2020 for 2019? $ ____________
☐ --I opened and/or made contributions to a **Roth IRA** in 2019. **11.** If you **PURCHASED REAL ESTATE** in 2019, bring **ALL** escrow papers.

12. ESTIMATED TAX PAYMENTS FOR 2019 (DO NOT INCLUDE WITHHOLDING FROM W-2s)

FEDERAL Date Paid	Amount	Date Paid	Amount	**CALIFORNIA** Date Paid	Amount	Date Paid	Amount
1. ________	$________	2. ________	$________	1. ________	$________	2. ________	$________
3. ________	$________	4. ________	$________	3. ________	$________	4. ________	$________

(Over for Deductions Information Worksheet) -- IF YOU ARE A NEW CLIENT --

PLEASE BRING COPIES OF YOUR 2018 FEDERAL AND CALIFORNIA RETURNS