



CEN - TAX

CLIENT INFORMATION WORKSHEET

Taxpayer/Spouse Information

Taxpayer Name: _____ DOB: _____ SS#: _____

Spouse Name: _____ DOB: _____ SS#: _____

Address: _____

City or County: _____ Home Phone: _____

TP Cell #: _____ Wk #: _____ Occupation: _____

SP Cell #: _____ Wk#: _____ Occupation: _____

Dependents that lived with you

1) Name: _____ DOB: _____ SS#: _____
Relationship to you: _____

2) Name: _____ DOB: _____ SS#: _____
Relationship to you: _____

3) Name: _____ DOB: _____ SS#: _____
Relationship to you: _____

4) Name: _____ DOB: _____ SS#: _____
Relationship to you: _____

Child Care Expenses

Did you have any daycare/caregiver expenses? _____ Amt. pd. for yr? _____

Name and address of daycare/caregiver: _____

Federal ID# or SS#: _____

ITEMS	TAXPAYER	SPOUSE	TOTALS
W-2's			
1099R's			
1099 MISC's			
SS Statement			
1098's (mortgage)			
1099 INT			
1099 DIV			
Previous year tax return			
Last yr's state refund amt			
Dependents SS cards			
# of written statements			
Moving Expenses			
Gambling Winnings			
Child Care Expenses			
Education Expenses			

How did you hear about Cen-Tax Tax Services? _____

By signing below you are acknowledging that you are releasing your tax forms to us for the preparation of your tax return and you are acknowledging that you are expected to pay for the tax preparation fees.

Taxpayer Signature: _____ Date: _____

Spouse Signature: _____ Date: _____

Office Use Only

Client to bring back the following items listed below before we can complete tax return.

Item _____	Item _____	Item _____
Date brought in _____	Date brought in _____	Date brought in _____
Taxpayers Initials _____	Taxpayers Initials _____	Taxpayers Initials _____

Item _____	Item _____	Item _____
Date brought in _____	Date brought in _____	Date brought in _____
Taxpayers Initials _____	Taxpayers Initials _____	Taxpayers Initials _____

Item _____	Item _____	Item _____
Date brought in _____	Date brought in _____	Date brought in _____
Taxpayers Initials _____	Taxpayers Initials _____	Taxpayers Initials _____