

# Jo's Tax Service

Solving the Mystery of your Taxes!  
Tax Preparation • Payroll • Bookkeeping

104 Sycamore Street, Culpeper, VA 22701  
Phone: (540) 825-0325 Fax: (540) 825-7288

## TAX INFORMATION SHEET

This form is to assist you in gathering your income tax information.

Name:	Spouse Name:
Phone (Day):	Phone (Day):
Phone (Eve):	Phone (Eve):
Marital Status:	(If Widow – Date of Death):

Dependents Name: (First, initial, and last name)	DOB	SSN	Relationship	Months lived in your home
Did you pay more than half the cost of maintaining your home?			YES	NO
Can someone claim you as a dependent?			YES	NO
<i>*If Dependent, name of Parent/Guardian:</i>				

**Check all that apply below – Please bring documentation with you to Jo's Tax Service.**

If you have SELF EMPLOYMENT income please list and detail on a separate sheet including mileage

W-2 Wage Statement	Rental Income (Fill out Self Employment Sheet)
Unemployment	Partnership/S Corp (K-1)
Social Security	Municipal Bonds
Pensions & Retirement Income	Estates/Trusts
Interest \$	Farm Income (Fill out Self Employment Sheet)
Dividends \$	Commissions (1099)
State Tax Refund \$	Installment Sale
Gambling Winnings \$	Tips/Other Income
Other:	Self Employment (Fill out Self Employment Sheet)

Did you sell any stock, real estate or business equipment of any kind?		YES	NO
Did you move at any time of the tax year to be closer to your job?		YES	NO

Did you make IRA or SEP contributions? If so please list.

--	--	--

### Alimony Received or Paid

Divorce Date		Alimony Received	
Alimony Paid			
Recipients Name		Recipients SSN	

### Federal Estimated Tax Payments

Date:	\$	Date:	\$	Date:	\$	Date:	\$
-------	----	-------	----	-------	----	-------	----

### State Estimated Tax Payments

Date:	\$	Date:	\$	Date:	\$	Date:	\$
-------	----	-------	----	-------	----	-------	----

**Child Care Information. Note: This information is required for each provider.**

Provider's Name	Address	SSN/EIN	Amount Paid

**\*\*ALL clients please be sure to fill out the Client Intake Form.**

**\*\*New clients or clients with changes please fill out the Client Data Sheet.**

