

Norvell & Scott, P.C.

Certified Public Accountants

2009 Darby Drive, Florence, AL 35630 256-764-9591 FAX 256-767-5979

TAX CLIENT INFORMATION SHEET

I. TAXPAYER/SPOUSE INFORMATION

Primary Taxpayer Full Name (from social security card): _____

Social Security Number: ____ - ____ - ____ Date of Birth: MM ____ DD ____ YEAR ____

Occupation: _____ Do you want \$3 to go to the Presidential Campaign Fund: ____

SPOUSE FULL NAME (as shown on social security card): _____

Social Security Number: ____ - ____ - ____ Date of Birth: MM ____ DD ____ YEAR ____

Occupation: _____ Do you want \$3 to go to the Presidential Campaign Fund: ____

MARITAL STATUS (circle one): Single Married Separated

STREET ADDRESS: _____

CITY _____ STATE _____ ZIP _____

EMAIL ADDRESS: _____

Daytime Phone #: (____) _____ - _____ Drivers License # _____ Exp date _____ Issue date _____

Evening Phone #: (____) _____ - _____ SP Drivers License # _____ Exp date _____ Issue date _____

Who may we thank for referring you to Norvell & Scott P. C.? _____

II. EXEMPTIONS

Please complete the following as applicable

	Name (As shown on social security card)	Date of Birth	Social Security Number	Relationship To Taxpayer	Months in Home
Dependent					
Dependent					
Dependent					
Dependent					
Dependent					

III. REFUND

If you are receiving a refund, tell us how you would like to receive the refund. (Check only one)

___ Check in the Mail (approx. 3 weeks- fees paid up front)

___ I'd prefer to make that decision when I know the amount of my refund.

___ Direct Deposit to your account (9-15 days- fees paid up front)

Financial Institution: _____

Routing Number: _____ Account Number: _____

Checking or Savings (please circle only one)

CLIENT INFORMATION SHEET

IV. ADDITIONAL INFORMATION

Did you or your spouse at any time during the year:

Circle: If yes, please provide

Did you live in any other states? NO YES

Did you work in any other states? NO YES

If yes, list the states and the dates you lived there:

Receive wages, salaries, or any other employer compensation? NO YES All W-2 forms

Have you received W-2 forms from ALL employers? NO YES

Receive unemployment compensation? NO YES All 1099-G forms

Receive Social Security Benefits? NO YES All 1099-SSA forms

Receive Alimony? NO YES

If yes, list amount _____

Pay alimony? NO YES

If yes, list name of recipient _____

SSN of recipient _____ Amount _____

Do you pay daycare expenses? NO YES Provider name & Address _____

If yes, list amount _____ SSN _____

Receive winnings from gambling? (Lottery, racetrack, casinos, raffles) forms NO YES All W-2-G

Receive any miscellaneous income? (Prizes, awards, jury duty) NO YES

If yes, list amount _____

And describe _____

Are you claimed as a dependent on someone else's tax return? NO YES

Pay interest on student loans? NO YES

Receive pension, annuity, IRA or retirement income? forms NO YES All 1099-R

Receive interest on savings, cash, US bonds, stock dividends? NO YES All 1099-INT

Do you have any of the following?

Home Mortgage? NO YES All 1098 forms

Medical expenses or pay for health insurance? NO YES List with amounts

Contributions to charity, church, etc? NO YES List with amounts

Out-of-pocket expenses or use your personal vehicle on the job? amounts NO YES List with

Loss from casualty (fire, theft, natural disaster) amounts NO YES List with

Did you have a job-related move? NO YES

Contribute to an IRA, SEP, Keogh, or simple retirement plan? NO YES

Pay college tuition expenses? NO YES

CLIENT INFORMATION SHEET

Did you or your spouse at any time during the year:

Circle: If yes, please provide

Sell stock, mutual fund, or other securities? forms	NO	YES	All 1099-B
Receive a 1099-MISC?	NO	YES	All 1099-MISC
Own your own business or were self-employed?	NO	YES	
Use a portion of your home exclusively for business?		NO	YES
Do you own rental property?	NO	YES	
Receive royalties?	NO	YES	
Sell your Home	NO	YES	All 1099-S forms
Sell any other property (equipment, land, etc.)?	NO	YES	
Did you make estimated tax payments?	NO	YES	

Operate a farm?	NO	YES	
Receive installment payments on property sold?	NO	YES	
Have an interest in a partnership, S-corporation, estate or trust?	NO	YES	All K1 forms
Have income as a minister?		NO	YES

V. SIGNATURE

ALL INFORMATION I HAVE GIVEN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE

IF I CHOSE NOT TO COMPLETE THIS RETURN, UPON TAX INFORMATION BEING INPUT INTO THE COMPUTER BY A TAX PREPARER THERE WILL BE A \$ 50.00 CONSULTATION FEE.

SIGNATURE: _____ **Date:** _____

