

# BPS Tax & Accounting Services LLC.

"In The Clients Best Intrest"

## CUSTOMER DATA SHEET

To ensure optimum tax service and to always maintain accurate records, BPS Tax & Accounting Services LLC. requires all customers to complete this form.

REFERRED BY (Last Name, First Name) \_\_\_\_\_

Were you a client of BPS Tax & Accounting Services LLC. last year or prior years? **YES OR NO**

\*PRIMARY NAME \_\_\_\_\_ \*SSN \_\_\_\_\_ \*BIRTHDATE \_\_\_\_\_

OCCUPATION \_\_\_\_\_ E-MAIL ADDRESS \_\_\_\_\_

ADDRESS \_\_\_\_\_ CITY, STATE, ZIP CODE \_\_\_\_\_

\*PHONE (Work) \_\_\_\_\_ (Home) \_\_\_\_\_ (Cell) \_\_\_\_\_

\*SPOUSE NAME \_\_\_\_\_ \*SSN \_\_\_\_\_ \*BIRTHDATE \_\_\_\_\_

OCCUPATION \_\_\_\_\_ E-MAIL ADDRESS \_\_\_\_\_

\*PHONE (Work) \_\_\_\_\_ (Home) \_\_\_\_\_ (Cell) \_\_\_\_\_

Dependent's Name (first, initial and last name)	Social Security Number	Relationship	Date of Birth (MDY)

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

1. SSN/EIN \_\_\_\_\_ Provider's Name \_\_\_\_\_

Provider's Address \_\_\_\_\_ City, State, Zip \_\_\_\_\_ Annual Amount Paid \$ \_\_\_\_\_

2. SSN/EIN \_\_\_\_\_ Provider's Name \_\_\_\_\_

Provider's Address \_\_\_\_\_ City, State, Zip Code \_\_\_\_\_ Annual Amount Paid \$ \_\_\_\_\_

Please check all of items that are applicable to the primary or spouse of the return.

- Are you a homeowner? **Purchase Date:** \_\_\_\_\_  Do you own more than one home?
- Are you active Military?  Do you own rental property?(Address Please)
- Do you have unreimbursed employee expenses?  Do you have educational expense?
- Do you own a business? \_\_\_Yes \_\_\_No C-Corp S-Corp LLC Partnership Sole Proprietor
- Do you have any outstanding debts? (Defaulted students loans, prior year back taxes, back child support, etc.)

1)Bank \_\_\_\_\_ Routing# \_\_\_\_\_ Account # \_\_\_\_\_ Ckg or Svg

2)Bank \_\_\_\_\_ Routing# \_\_\_\_\_ Account # \_\_\_\_\_ Ckg or Svg

Would you like to pay for tax preparation fee by credit card Visa MasterCard Debit Card? (**A 3% Fee will Apply**)

Credit card number \_\_\_\_\_ Exp \_\_\_\_\_ Code \_\_\_\_\_

I attest that all information that is given on this data sheet and to the preparer is true and accurate to the best of my knowledge and is subject to possible IRS or State review. I understand that I am solely responsible for all fees which are due at the time of service no later than 30 days after transmission of information to the IRS. L & B Tax Service, Inc. will take all necessary steps required to collect outstanding debts (including reporting to our collection dept. via your SSN). **I agree to pay a \$50 fee at the time of service, once my data has been entered, if I decide not to have my Tax Return prepared by BPS Tax & Accounting Services LLC.**

X \_\_\_\_\_

Primary's Signature

\_\_\_\_\_ Date

X \_\_\_\_\_

Spouse's signature

\_\_\_\_\_ Date

## PERSONAL DATA

- Social Security Cards (including self, spouse, & dependents)
- Driver's License or ID Card
- Child Care Provider: Name, Address, Tax ID# or SSN, & Amount Paid
- Education Expense: 1098T
- Prior Year Taxes

## EMPLOYMENT & INCOME DATA

- W-2 forms for this year
- Unemployment compensation: Form(s) 1099-G
- Miscellaneous income including rent: Form(s) 1099-MISC
- Pensions and Annuities: Form(s) 1099-R
- Social Security Benefits: Form(s) SSA 1099
- Partnerships & S Corporations: Schedule K-1
- State and Local Income Tax Refunds: Form(s) 1099-G
- Gambling and Lottery winnings: Form W-2G
- Interest Income: 1099 INT
- Dividend Income: 1099 INT
- Proceeds from Stocks: 1099-B
- Sale of Home Income (Loss): 1099-B
- Cancellation of Debt: 1099-C
- Bankruptcy: 1099-A
- Tip / Other Income

## ITEMIZED DEDUCTIONS

- Mortgage Interest Statement: Form(s) 1098
- Real Estate Taxes Paid
- Personal Property Taxes: Ad Valorem
- Charitable Donations
- Church Tithes & Offering
- Unreimbursed Job Expenses
- Unreimbursed Medical Expenses
- Current year settlement statement (purchase of new home/refinance)

## ADJUSTMENTS

- Student Loan Interest Paid
- IRA Contributions
- Early Withdrawal Penalties
- Moving Expenses
- Tuition and Fees

## SELF-EMPLOYMENT DATA

- Business Income: Form(s) 1099 MISC and/or own records
- Partnership Income: Schedule K-1/Corporation income
- Business-related expenses: receipts and other documents
- Employment taxes & other estimated business taxes paid for current tax year
- Tax ID number or Incorporation papers