

TAXPAYER INFORMATION

JANG & COMPANY ACCOUNTANCY CORPORATION

(1) Taxpayer ()

| | Yourself (/) | Spouse (/) |
|-----------------------|------------------------|----------------------|
| Name () | | |
| S S N | | |
| Address () | | |
| Occupation () | | |
| DOB () | | |
| Telephone () | Work () | Home () |

(2) Dependent ()

| | Name () | DOB () | S S N | Relation () | Student ()Y/N |
|---------------------|-----------------|----------------|-------|---------------------|-----------------------|
| Child(1) () | | | | | |
| Child(2) () | | | | | |
| Child(3) () | | | | | |
| Other () | | | | | |
| Other () | | | | | |

(3) Document required ()

- Last year income tax return copy (New client)
- Form W-2, interest, dividend, pension distribution, and commission income (1099)
- Business income and expenses
- Rental income and expenses
- Capital gain/loss documents (stock transaction, escrow paper, etc.)
- Partnership/S corporation income(K-1), Unemployment, social security benefit
- Medical expenses, property tax, DMV registration renewal, donation
- Mortgage interest(1098), college tuition(1098-T) student loan interest(1098-E)
- Dependent care expense (name, address, telephone, tax ID, amount)
- Retirement contribution and bank account information or check copy