

Please fill in as much of the following information as you can.

1. Personal Information No Changes?

Name	Soc. Sec. No.	Date of Birth	Occupation	Cell Phone	Daytime Phone
Taxpayer				() -	() -
Spouse				() -	() -
Current Address		City	State	Zip	School District
Email Address (Taxpayer)		Email Address (Spouse)			How did you hear about Acade? (Website?, Person?, Signs?)

2. Dependents (Children & Others) No Changes?

Name	Relationship to you	Soc. Sec. No.	Date of Birth	Months in Home (1-12)	Attending Child Care?	Going to College?

3. Other Information that may not be included with your tax forms

Questions:	Y N		Y N
1. Do you own your own business?	<input type="checkbox"/> <input type="checkbox"/>	14. Did you pay any child care expenses?	<input type="checkbox"/> <input type="checkbox"/>
2. Did you sell any stocks or investments in 2019?	<input type="checkbox"/> <input type="checkbox"/>	- To Whom _____	
3. Do you own any rental property?	<input type="checkbox"/> <input type="checkbox"/>	- Address _____	
4. Any cancelled or forgiven debts?	<input type="checkbox"/> <input type="checkbox"/>	- Phone # _____ Tax ID # _____	
5. Did you pay any interest on a student loan?	<input type="checkbox"/> <input type="checkbox"/>	15. Did you make any contributions to a personal (not employer) IRA?	<input type="checkbox"/> <input type="checkbox"/>
6. Did you pay any tuition and book expenses for College?	<input type="checkbox"/> <input type="checkbox"/>	- You to a Roth IRA \$ _____ (or) Traditional IRA \$ _____	
7. Did you make any contributions to an Education Savings (529) Plan?	<input type="checkbox"/> <input type="checkbox"/>	- Spouse to a Roth IRA \$ _____ (or) Traditional IRA \$ _____	
8. Do you have any open issues or balances with IRS or NY State?	<input type="checkbox"/> <input type="checkbox"/>	16. Did you live in <u>New York City</u> at any time in 2019?	<input type="checkbox"/> <input type="checkbox"/>
9. Do you own foreign financial accounts or property >\$10,000 in value?	<input type="checkbox"/> <input type="checkbox"/>	Popular New York State Credits:	
10. Did you install solar energy features in your house in 2019?	<input type="checkbox"/> <input type="checkbox"/>	IT-209 - Are you a non-custodial parent paying child support?	<input type="checkbox"/> <input type="checkbox"/>
11. Do you use any part of your home for your business?	<input type="checkbox"/> <input type="checkbox"/>	IT-214 - Did you earn less than \$18,000 AND pay less than \$450/mo. in rent?	<input type="checkbox"/> <input type="checkbox"/>
12. Did you make any estimated tax payments to prepay 2019 taxes?	<input type="checkbox"/> <input type="checkbox"/>	IT-237 - Do you own a home in a Nationally Registered Historic District?	<input type="checkbox"/> <input type="checkbox"/>
13. Were you covered by Health Insurance for all of 2019?	<input type="checkbox"/> <input type="checkbox"/>	IT-245 - Are you a volunteer firefighter or ambulance worker?	<input type="checkbox"/> <input type="checkbox"/>

4. Income & Deductions (Please circle items of income you've received and expenses you've paid)

Income: Alimony • Scholarships and Grants • Gambling and Lottery • Unemployment • Social Security Benefits • Retirement and Pensions • State Refund

Deductions: Health Premiums • Rx Drugs • Hospital Charges • Co-Pays • Dental • Long Term Care • Medical Mileage • Property Taxes • Car Purchase
Mortgage Interest • Home Equity Interest • Cash Donations • Church Offerings • United Way • Goodwill/Sal Army/Amvets • Gambling Losses
Unreimbursed Job Travel • Unreimbursed Job Expenses • Union Dues • Professional Dues • Licenses • Financial Advisor Fees • Tax Preparation Fees

5. Direct Deposit / Direct Debit No Changes?

Bank Name	9 Digit Routing Number	Account Number	Checking <input type="checkbox"/>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	Savings <input type="checkbox"/>

I would like to pay any tax owed via an Electronic Debit to this bank account on this date _____
 I would prefer to pay any tax balance due myself by check or credit card (using supplied voucher).

Note: For an additional \$33.95 charge you can have your tax preparation fees deducted from your refund.

The advantage to this is that you will owe nothing at the time your taxes are prepared and will be charged later when your refund is sent, however, this costs an additional \$33.95 over what I would charge if you pay me at the time I complete your return.