

CALBERTS TAX SERVICES

CLIENT INFORMATION SHEET

(Please include a copy of your last year's return)

TAXPAYER NAME: _____	SPOUSE NAME: _____
SSN: _____ BIRTHDATE: _____	SSN: _____ BIRTHDATE: _____

ADDRESS: _____ APT #: _____

CITY: _____ STATE: _____ ZIP: _____

PHONE (DAY): _____ PHONE (EVE): _____ EMAIL: _____

Dependents: (First, Middle Initial, Last)	Birthdate	SSN	Relationship to you	Have dependent lived all year in home?

CHECK ALL THAT APPLY

- Someone else can claim you as a dependent.
- You and your spouse lived apart during the year.
- You paid estimated Federal or State taxes last year. Federal \$ _____ State ____ State \$ _____
- You itemized last year. If yes, amount of Refund from/Balance Due to State \$ _____.
- You or your spouse were a resident of another state or earned income in another state during last year.
- You use your personal vehicle for work and did not get reimbursed (excluding commuting)
- You purchased a home before May, or were under contract to purchase a home before May and closed by September 30, 2010 and have not claimed the First-Time Home Buyers credit.
- You purchased a home in 2008 and received the up to \$7,500 First-time Home Buyers credit.
- You paid state and local real estate taxes.
- You converted a qualified retirement plant to a Roth.

Would you like your refund deposited into your bank account: Yes No

Checking Savings Routing Number _____ Account Number _____

I CERTIFY THAT I WOULD LIKE MY TAXES PREPARED ACCORDING TO THE INFORMATION I SUPPLIED ABOVE

Taxpayer's Signature _____ Date _____

Spouse's Signature _____ Date _____