

**Madigan Tax Service**  
**Client Information Form**

**Name (s):** \_\_\_\_\_

**SSN**

**DOB**

**Taxpayer:**

**Taxpayer:**

First Name \_\_\_\_\_

\_\_\_\_ - \_\_\_\_ - \_\_\_\_

\_\_\_\_ / \_\_\_\_ / \_\_\_\_

Middle Initial \_\_\_\_\_

Last Name \_\_\_\_\_

**Spouse:**

**Spouse:**

First Name \_\_\_\_\_

\_\_\_\_ - \_\_\_\_ - \_\_\_\_

\_\_\_\_ / \_\_\_\_ / \_\_\_\_

Middle Initial \_\_\_\_\_

Last Name \_\_\_\_\_

**Dependent(s)**

**Dependent(s)**

**1.**

**1.**

First Name \_\_\_\_\_

\_\_\_\_ - \_\_\_\_ - \_\_\_\_

\_\_\_\_ / \_\_\_\_ / \_\_\_\_

Middle Initial \_\_\_\_\_

Last Name \_\_\_\_\_

**2.**

**2.**

First Name \_\_\_\_\_

\_\_\_\_ - \_\_\_\_ - \_\_\_\_

\_\_\_\_ / \_\_\_\_ / \_\_\_\_

Middle Initial \_\_\_\_\_

Last Name \_\_\_\_\_

**3.**

**3.**

First Name \_\_\_\_\_

\_\_\_\_ - \_\_\_\_ - \_\_\_\_

\_\_\_\_ / \_\_\_\_ / \_\_\_\_

Middle Initial \_\_\_\_\_

Last Name \_\_\_\_\_

Address: \_\_\_\_\_

House # & Street

\_\_\_\_\_  
City,

\_\_\_\_\_  
State,

\_\_\_\_\_  
ZipCode

Phone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

School District: \_\_\_\_\_

**Direct Deposit Information:**

Bank Name:

\_\_\_\_\_

Routing Number:

\_\_\_\_\_

Account Number:

\_\_\_\_\_

**Photo ID Information:**

Taxpayer Name \_\_\_\_\_

State: \_\_\_\_\_

Id Number: \_\_\_\_\_

Issue Date: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

**Photo ID Information:**

Taxpayer Name: \_\_\_\_\_

State: \_\_\_\_\_

Id Number: \_\_\_\_\_

Issue Date: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

## Things to bring to your appointment:

### Personal documents

Bring all documents below.

- **Photo ID**
- **Social Security Cards**, Social Security Number verification letters, or Individual Taxpayer Identification Number assignment letters for you, your spouse, and any dependents
- **Birthdates** for you, your spouse, and dependents on the tax return
- **Bank account and routing number** or a voided check for direct deposit of your refund

### Income

Bring all documents that apply.

#### Employment Income

- **W-2** form(s) for all jobs last year (your employer(s) will have sent you this by January 31st)

#### Self-Employment Income

- **1099-MISC** and/or **1099-K**
- **Records of income not reported** on 1099 forms
- **Records of expenses** including receipts, credit statements, etc.
- **Record of estimated tax payments**

#### Retirement Income

- **SSA-1099** form for Social Security benefits
- **1099-R** for pension/IRA/annuity income

#### Other sources of income

- **1099-G** for refund of state/local income taxes
- **1098-T** for scholarships/fellowships
- **1099-R** for disability income
- **Income or loss from the sale of stocks, bonds, or real estate**

- **Income or loss from rental property**
- **Alimony received.**
- **Statements for prizes or lottery/gambling winnings**
- **Interest and dividend** statements from banks
- **Records for any other income**

## **Expenses**

You may be able to claim tax deductions for some of the expenses you have. These deductions reduce the income you are taxed on. Bring documentation for all of the following expenses you have.

- **Retirement contributions**, including a 401(k) or IRA
- **State and local taxes** you've paid
- **Mortgage statements and property tax bills** if you are a homeowner
- **College tuition** (1098-T) and student loan statements (Form 1098-E)
- **Childcare expenses**, including provider's address and federal tax ID number
- **Receipts for charitable donations**
- **Medical and dental bills**
- **Records for supplies used as an educator**

## **Additional Items**

- **Last year's tax return** if available
- **Proof of health insurance** or exemption: Form **1095-A** if you had coverage through the Health Insurance Marketplace, Form 1095-B/1095-C if you had other kinds of insurance, or a Health Insurance Exemption Certificate, if received
- **Tax notices**: Documents from the IRS, Health Insurance Marketplace, your state tax agency, or anything that says "**IMPORTANT TAX DOCUMENT**"