2015
PERSONAL AND INCOME INFORMATION WORKSHEET
Must Be Filled In as Completely as Possible
(Use Your 2014 Return as a Guide)

Your Name ______________________________ Your Social Security Number ______________________
First MI Last

Spouse's Name ______________________________ Spouse's Social Security No______________________
First MI Last

Address: ____
Street City State Zip

TELEPHONE NUMBERS (please include area code) Home ______________ Your Work ______________ Spouse's Work ______________

CELL PHONE NUMBERS (please include area code) Yours ______________ Spouse's ______________

OCCUPATIONS - Yourself ______________________ Your Spouse ______________________

DATE OF BIRTH - Yourself ______________ Your Spouse______________ Email address: ______________________
MO DAY YEAR MO DAY YEAR

Registered domestic partners check here ☐ **If entire family covered by health insurance all year check here** ☐

DEPENDENT INFORMATION

Full Name	Date of Birth	Social Security Number	Relationship	Months Lived in Your Home in 2015

Do you want any refunds due you directly deposited to your checking or savings account? ____Yes ____No If yes, is the information provided last year still accurate? ____Yes ____No (If no, we need current routing number and account number)
(Please Bring all W-2s, Forms 1099 and Other Documents Indicating Income Received)

1. Total **WAGES** earned: (optional - we will add this up for you) $ ______________ **2. TIPS RECEIVED** but not reported to your employer: $ ______________

3. INTEREST INCOME: (Please bring Forms 1099 or Year End Statements)

If you received interest income from a seller financed mortgage in 2015, bring name, address & social security number of payer—this is an IRS requirement.

Payer's Name	Amount	Payer's Name	Amount

Early Withdrawal Penalties: $ ______________ **Tax Exempt Interest:** $ ______________ **(Bring Statements)**

4. **DIVIDEND INCOME:** (Please bring Forms 1099 or Year End Brokerage Statements)

Payer's Name	Gross Dividends	Payer's Name	Gross Dividends

5. ALIMONY RECEIVED: $ ______________. **ALIMONY PAID:** $ ______________ - SSN of Person the Alimony was Paid to - ______________________

6. UNEMPLOYMENT COMPENSATION RECEIVED: $ ______________________

7. SOCIAL SECURITY PAYMENTS received: Yourself $ ______________ Your Spouse $ ______________

8. If you **SOLD** stocks, real estate or other assets in 2015, bring all pertinent papers. If you had **STOCK TRANSACTIONS**, please bring brokerage buy and sell slips or a detailed listing. **We need to know when you bought the stock and how much you paid for the stock!**

9. MISCELLANEOUS INCOME not shown elsewhere - **SOURCE:** ______________________________ **Amount: $** ______________

10. I have an ☐ **IRA** or a ☐ **Keogh Plan**. How much paid in 2015? $______________ How much paid in 2016 for 2015? $ ______________
☐ --I opened and/or made contributions to a **Roth IRA** in 2015. **11.** If you **PURCHASED REAL ESTATE** in 2015, bring **ALL** escrow papers.

12. ESTIMATED TAX PAYMENTS FOR 2015 (DO NOT INCLUDE WITHHOLDING FROM W-2s)

FEDERAL				CALIFORNIA			
Date Paid	Amount	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount
1. __________	$__________	2. __________	$__________	1. __________	$__________	2. __________	$__________
3. __________	$__________	4. __________	$__________	3. __________	$__________	4. __________	$__________

(Over for Deductions Information Worksheet) -- IF YOU ARE A NEW CLIENT --
PLEASE BRING COPIES OF YOUR 2014 FEDERAL AND CALIFORNIA RETURNS