

TODAY'S DATE

EZ EXPRESS INCOME TAX ITEMIZER

TAX YEAR

FOR DEPENDENT CHILDREN UNDER AGE 18 OR IN COLLEGE

2020

NEW CLIENT NEW ADDRESS

PARENTS NAME _____

TAX PAYER'S NAME: _____ SS # _____

TAX PAYER'S OCCUPATION: _____ BIRTH DATE: _____

STREET ADDRESS: _____ CITY: _____ STATE: _____ ZIP CODE: _____

COUNTY _____ SCHOOL DISTRICT: _____

HOME PHONE NUMBER: _____ EMAIL ADDRESS: _____

FORMS & THINGS TO BRING

- W-2: How Many? _____
- BANK FORM 1099-INT for Interest Income: How Many? _____
- DIVIDENDS FORM 1099-DIV How Many? _____
- NEW CLIENTS – Please Provide Last Year's Tax Return
- VIRTUAL CURRENCY BOUGHT/SOLD?

SALE OF STOCK OR OTHER PROPERTY

DESCRIPTION	DATE BOUGHT	DATE SOLD	SALE PRICE	COST PRICE

OTHER INFORMATION

OTHER INCOME

Jury Duty _____

Unemployment _____

Fed Unemploy WTH Tax _____

State Unemploy WTH Tax _____

Gambling/Bingo/Lottery Winnings _____

Did you attend college in 2020? YES NO

If YES, please provide FORM 1098-T. We will determine if it goes on your parents return or yours.

***You can obtain a FORM 1098-T from your student online account. Tax Year 2020

Are you a VOLUNTEER FIREFIGHTER or AMBULANCE WORKER? YES NO

Any Foreign Bank Accounts? YES NO

How Do You Want to Receive Your Refund? Pay Balance Due?

Check Direct Deposit/Debit ROUTING #: _____ ACCOUNT #: _____

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