AGA Tax and Retirement Advisors 409-840-6905

Tax Info Sheet please fax back to number above or bring to your scheduled appointment with W-2, 1099, 1098 (mortgage interest), receipts, property tax bills, previous year/s tax returns and any other necessary documents. Thank you..

Name Date of Birth Social Security # Filing Status Occupation

1___________________________ ___________ ________________ __________ _______

2___________________________ ___________ ________________ __________ _______

Address:____________________________________ City:________________ State:___ Zip:______

Phone: ____

Check if client #1____Disabled ____Blind ____Age 65+ Client #2____Disabled ____Blind ____65+

Dependents Names Date of Birth Social Security # Lived with you

3___________________________ ___________ ________________ ___________

4___________________________ ___________ ________________ ___________

5___________________________ ___________ ________________ ___________

6___________________________ ___________ ________________ ___________

Post high-school tuition costs (include receipts or 1098-T) ________Student Loan Interest _______

Childcare/dependent expenses ________ Provider name __________________ Tax/SS#__________

Contributions to IRA (circle Roth or Traditional) 1 _________ 2 _________ Distributions?________

Would you like to contribute to an IRA if it saves you taxes? ____________

Any capital gains/losses? Amount ___________ Losses can be carried forward.

Did you own a business/have any self-employment income _________ If yes, we'll need expenses also

Sale of a home this tax year? _________ If yes, did you live in it 2 out of last 5 years? ______

Taxes Paid _________Real Estate _________Property (including vehicles)

Charitable Donations $__________ Include receipts, canceled checks. Charitable Mileage_______

Did you have medical expenses? _________

Health Insurance costs (if not on W-2) _________ Long Term Care Insurance costs_________

Did you have any "unreimbursed" employee expenses? ______ If so how much $___________

I would be interested in possibly increasing my interest rate earned and lowering my taxes?_______

Any additional information we should know about your taxes? If so, describe: