

## FORM #1: CUSTOMER INFORMATION SHEET

Taxpayer	_____			
	name	ssn	dob	job title
*Can anyone claim you as a dependent?	Y/N			
Spouse	_____			
	name	ssn	dob	job title
Address	_____			
	mailing address (including city, state and zip code)			
Phone	_____		Email _____	
	home/cell	work		
<i>Preparer-Use Only: Verify Name, Address, SSN, DOB</i>				

<b>DEPENDENT INFORMATION</b> (as it appears on the social security card, otherwise the IRS will deny)				
*Are any of your dependents disabled? Y/N		*Are any of your dependents married? Y/N		
	name	ssn	dob	relation # months in home
1	_____	_____	_____	_____
2	_____	_____	_____	_____
3	_____	_____	_____	_____
4	_____	_____	_____	_____
*Do you financially support anyone else? Y/N				

<b>EARNED INCOME CREDIT QUESTIONS (EIC)</b>	N/A [ ]
1. Are you married? Y/N    a) If yes, did you live with your spouse after June 30th, 2011? Y/N	
2. Were any children living with you for more than 6 months during 2011? Y/N	
3. Did you live in the U.S. for more than 6 months during 2011? Y/N	

<b>CHILD CARE INFORMATION (for each provider)</b>	
name _____	ssn/ein _____
address _____	amt paid _____
name _____	ssn/ein _____
address _____	amt paid _____

**INCOME (indicate all sources of income and provide documentation)**

	YES	NO		YES	NO
W-2 Wages			Self-Employment Income (use FORM 2)		
Interest/Dividends			Rental Property (use FORM 3)		
Retirement (1099-R)			Partnership, Trust, SCORP (K-1)		
Social Security			Gambling Winnings (W-2G)		
Unemployment			Alimony		
Tips			Stock Sales		

**ADDITIONAL INFORMATION FOR TAX PREPARATION**

	YES	NO		YES	NO
Are you a K-12 teacher?			Did you contribute to a retirement plan?		
Did you move in 2011?			Did you pay for your own health insurance?		
Do you own a home?			Did you have significant medical costs?		
Did you have tuition expense?			Did you buy an energy efficient appliance?		
Did you pay alimony?			Did you make any political contributions?		
Did you work in multiple states?			Did you get a state tax refund?		
Did you donate to charity?			*Do you use part of your home for business?		
Are you re-paying a student loan?			*If yes to above, please fill out FORM 5		

**NOTES**

By signing this statement I agree that the information furnished to In or Out Tax Service, Inc., for preparing and filing my tax return, is true and correct to the best of my knowledge. In or Out Tax Service, Inc.'s, liability is limited to paying penalties and interest incurred due to their error. In or Out Tax Service, Inc., is not responsible for interest or penalties on my return if I (or my spouse) provided inaccurate information, or if I (or my spouse) neglected to provide necessary tax information. Additionally, I agree to pay an hourly fee (not to exceed \$100/hr) if I decline to complete my tax return with In or Out Tax Service, Inc., after work has begun.

Customer Signature \_\_\_\_\_ Date \_\_\_\_\_