<u>Please return this form with all your information</u>
<u>when you come for your initial tax preparation appointment</u>.

Unless your previous tax returns were completed by Wood Financial Group, LLC, please bring the following:

1. Previous 2 years tax returns.
2. Names, Dates of Birth and Social Security Numbers of all dependents

Please remember to bring all of your W-2 forms, 1099 Interest (including accounts with Wood Financial Group), Dividend or Pension forms, and your Social Security Statements if you receive social security payments.

Did you live or work in another state this year? **Yes___________ No___________**

Do you have any rental property? **Yes___________ No___________**

If yes, how many?__________________

<u>*Schedule E-Rental Property</u>

If yes, please bring your records for each property, including **totals** for all expenses and taxes paid. If possible provide us with the total amount for each expense category on each property.

Did you itemize deductions last year on Schedule A? **Yes___________ No___________**

<u>*Schedule A-Itemized Deductions</u>

If yes, please provide the following:

- Total for all out of pocket prescription, doctor bills and health insurance premiums you paid
- Mortgage interest statements you have received and the amount of real estate taxes you paid on your home.
- The total amount of any charitable contributions you paid in cash and any statements for non-cash donations.
- Any job related expenses you have incurred that was not reimbursed to you (such as auto expenses)
- Tax preparation fees you paid last year are also deductible.

Did you sell or redeem any types of securities through another firm? **Yes___________ No___________**

<u>*Schedule D-Capital Gains & Losses</u>

If yes, please provide the record of each sale or redemption AND the amount you originally paid for the stock, bond or mutual fund instrument. Your broker should be able to provide you with a print-out of this information. Please try to obtain this information before your appointment as we will be unable to complete your tax return until we have it.

Do you own a business or are you self-employed? **Yes___________ No___________**

<u>*Schedule C- Profit or Loss from Business</u>

If yes, please provide the **totals** on all income and expenses related to your business or self-employment. If you used a vehicle in your business, please provide the **total** miles you drove during the year, how much of that was business related, and how much was personal. <u>We ask that you provide **total figures** for each expense and income category as we are not equipped to handle bookkeeping duties.</u>

Did you receive any Schedule K-1 forms for shares in a Partnership, Limited Liability Company or Subchapter S Corporation?

If yes, please bring copies of all of your Schedule K-1 forms. **Yes___________ No___________**

Finally, if you made estimated tax payments, please bring a record of the payments that were made for the tax year 2016.

<u>Continued on the back…</u>

Client Profile

Your Name	First		MI	Last	
	Birth date			Your SSN	
Spouse Name	First		MI	Last	
	Birth date			Spouse SSN	
Address	Street			Suite/Apt	
	City			State	Zip
Contact Info	Home	Cell		***Email:***	
Employment Information	Taxpayer Employer			Work Phone	
	Spouse Employer			Work Phone	

Dependent Information

First Name	MI	Last Name	SSN	Birth Date	Relationship

Do you have any investments with our company Wood Financial Group? YES_______ or NO________

Do you or your spouse own an IRA or 401K? YES ___ NO ____If yes, did you contribute to it? YES__NO__
Amount: You: $_____________________Spouse : $____________________

Do you or your spouse own any tax deferred annuities? YES ________ NO _______

Did you or your spouse take any distributions? YES_______NO________

Did you sell stocks, bonds or mutual funds in 2015? ________ Do you have your broker's statement? _______

Did you re-finance your home in 2016? __________ Did you pay any points? Amount: $ _________________

Did you pay estimated taxes for 2016? ____________Amount: $ _________________

Did you have an early withdrawal or distribution from a pension plan or IRA? _____ Rollover: $ ___________

How much did you pay for tax preparation last year? Amount: $_________________