

Personal Information						
First Name	M.I.	Last Name	Social Security Number	Date of Birth		
Taxpayer:						
Driver's License #	State of Issue		Issue Date	Exp. Date		
Spouse:						
Driver's License #	State of Issue		Issue Date	Exp. Date		
Occupation	Employer			Airline/Base		
Taxpayer:						
Spouse:						
Street Address		Apt.#	City	State	Zip Code	
Filing Address:						
Mailing Address:						
Cell Phone Number	Home Phone Number		Email			
Taxpayer:						
Spouse:						
Filing Status						
<input type="checkbox"/> Check if a parent (or someone else) can claim you as a dependent on their return						
<input type="checkbox"/> Single	<input type="checkbox"/> Married Filing Joint		<input type="checkbox"/> Qualifying Widow(er) Spouse's Date of Death			
<input type="checkbox"/> Married Filing Separate	Spouse Name:		Spouse Soc. Sec. #:			
	Check if you lived apart from your spouse for all of 2018?			<input type="checkbox"/> Yes		<input type="checkbox"/> No
<input type="checkbox"/> Head of Household <i>If you are the custodial parent and someone else is taking the exemption for your child, complete this section.</i>	Name:		Soc. Sec. #:			
	Relationship:	Date of Birth:	Number of months lived with you:			
	Who is claiming this person on their return?					
Name	DOB	SSN	Relationship	Months at home	Full Time Student	Disabled
					<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

CALL (832) 777-6003

SKYTAXES
 Presidential Plaza
 15655 John F. Kennedy Blvd Suite G
 Houston, TX 77032

FAX (866) 538-8897

Located next to Godfathers Pizza, N. of Beltway 8, W. of 59N, E of Hardy Toll Rd

WWW.SKYTAXES.NET

Life Events - Please check all that apply for 2018

<input type="checkbox"/> Marriage Divorce/Separation	<input type="checkbox"/> Adoption	<input type="checkbox"/> Own rental property
<input type="checkbox"/> Retirement (IRA, 401K) withdrawals	<input type="checkbox"/> Purchased / Sold a home	<input type="checkbox"/> Made home energy efficient improvements
<input type="checkbox"/> Own or Started a business	<input type="checkbox"/> Sold stock	<input type="checkbox"/> Foreign earned income

Income - Please provide applicable Forms W2 and 1099

Interest Income: Form 1099-INT or Dividend Income: Form 1099-DIV	<input type="checkbox"/> Yes <input type="checkbox"/> No
Sale of Stock or Bonds- please include <u>complete</u> purchase and sale information: Form 1099-B	<input type="checkbox"/> Yes <input type="checkbox"/> No
Retirement Plan Income: Form 1099-R	<input type="checkbox"/> Yes <input type="checkbox"/> No
Unemployment Compensation: Form 1099-G	<input type="checkbox"/> Yes <input type="checkbox"/> No
Social Security Benefits: Form SSA-1099 or RRB-1099	<input type="checkbox"/> Yes <input type="checkbox"/> No
State or Local Refund Received: Form 1099-G, Itemized in 2018? <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Alimony Received: How much? \$ _____	<input type="checkbox"/> Yes <input type="checkbox"/> No
K-1 from a Corporation, Estate, Trust, Partnership, Etc.?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Collection of Debt: 1099-C	<input type="checkbox"/> Yes <input type="checkbox"/> No
Gambling Winnings!: Form W2-G	<input type="checkbox"/> Yes <input type="checkbox"/> No
Business Income: 1099-MISC. Please provide 1099-MISC and complete schedule "C" to the best of your ability. We will contact you for further information and details of your business expenses.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Royalty Income: 1099-MISC.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Rental Income: Please attach Schedule "E" (available on our website) with preliminary notes for us to work with. We will contact you for further information.	<input type="checkbox"/> Yes <input type="checkbox"/> No

Estimated or Quarterly Tax Payments paid in 2018 Yes No *(made directly to the IRS usually for self-employment/investment income, not from your W2)* \$ _____

Alimony Paid \$ _____ **Recipient's Name:** _____ **SSN:** _____

IRA Contributions

Taxpayer	\$ _____	<input type="checkbox"/> Roth <input type="checkbox"/> Traditional
Spouse	\$ _____	<input type="checkbox"/> Roth <input type="checkbox"/> Traditional

Educational Deductions & Student Loan Interest

Student Loan Interest Paid- Please provide Form 1098-E **Tuition Paid-** Please provide Form 1098-T **1099-Q**

Student _____ Year in college _____ At least half time? Yes No
 Book, Lab, Technology expenses? _____ Room and Board _____

Student _____ Year in college _____ At least half time? Yes No
 Book, Lab, Technology expenses? _____ Room and Board _____

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