



# 3E GLOBAL KONSULTING LLC

Management & Business Advisory | Fraud & Forensic Investigation | QuickBooks & Accounting | Payroll & Taxes | NonProfit Management

Tel: 301.922.1262  
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## CLIENT TAX RETURNS PREPARATION DATA SHEET

Taxpayer Name..... Spouse Name.....  
Occupation..... Occupation.....  
Date of Birth..... Date of Birth.....  
SSN..... SSN.....  
Address..... Apt. #.....  
City..... State..... Zip Code.....  
Cellphone..... Home Phone..... Email.....

Dependents Name (First, Middle Initial, Last Name)	Date of Birth Mo/Day/Year	Dependent's SSN	Relationship to you	Months lived in your home this tax year

### Child Care Information

Provider's Name..... Provider's SSN/EIN.....  
Provider's Address..... Amount Paid to Provider \$.....

### Please provide the following tax forms/documents and responses needed for your tax returns

- W-2                       1099-INT                       1099-DIV (or 1099-Comp)                       1099R
- W-2G                       Taxpayer's RRB-1099                       Spouse's RRB-1099                       Taxpayer's SSA-1099
- Spouse's SSA-1099                       1099-Misc                       1099-Q     1099-B                       K-1 Partnership
- K-1 S-Corp                       K-1 Trusts                       Alimony Received                       Jury Duty
- Gambling and Lottery Winnings                       Prizes and Awards                       Scholarship and Fellowships
- State and Local Income Tax Refund                       1098 Home Mortgage                       1099-G Unemployment Compensation
- Did you receive any other income not listed above?
- Could you be claimed as a dependent on another person's tax return?
- Did you work as a consultant, contractor, or own a business? If so, please provide all business expenses and vehicle miles.
- Are you required to travel between job sites (either primary job or second job)?
- Did you incur expenses in performing your employer's job and have not been reimbursed?
- Any unreimbursed expenses for volunteer work?
- Did you buy or sell stocks, mutual funds, bonds, or other investment properties?
- Did you buy, sell, or refinance your home?



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- Was your home rented out or used for business?
- Did you buy or sell rental property?
- Did you incur a loss because of damaged or stolen property?
- Did you donate money, clothes, cars, or stock?
- Did you pay interest on a student loan?
- Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?
- Did you pay any other tuition or continuing education expenses?
- Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)?
- Did you transfer or rollover any amount from one retirement plan to another retirement plan?
- Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2012?
- Did you make or do you plan on making an IRA or Roth IRA contribution for 2015?
- Health Savings Account contributions, distributions, and unreimbursed qualified medical expenses.
- Did you incur any out of pocket medical and dental expenses?
- Did you drive long distances for medical care?
- Did you pay estimated federal and state taxes?
- Did you pay to prepare your returns last year?
- Do you want to electronically file your tax return?
- For direct deposit, please attach a void check
- Please list any questions or other concerns you might have.
- Would you like to use the same direct deposit information provided last year?
- May the IRS discuss your tax return with us your preparer?

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 I/We certify that the information I/We provided above is complete and accurate and I/We will like my tax returns be prepared according to the information I/We supplied above.

Taxpayer's Signature.....Date..... Spouse's Signature.....Date.....

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Questions? Contact us at [edwin@3egk.com](mailto:edwin@3egk.com) or 301-922-1262