

GTS Appointment-less Tax Preparation
TAX PLANNER 2006

- ✓ On a page 2 of this tax planner, write the following. (even if you think I have it already)
 - a. Your name, social security number, and birth date. (your name must be spelled as it looks on your social security card.)
 - b. Same personal information as above for your spouse (if filing jointly)
 - c. Same personal information as above for any dependents. (if you want to know if you can, or should claim someone as a dependent please call me.)
 - d. Your current home address.
 - e. Yours (and spouse if applicable) home phone number, work number, and cell phone number.
- ✓ All copies of yours (and spouse's if applicable) w-2's, 1099's, or other income documentation.
- ✓ All copies of mortgage interest statements, property tax documentation, and vehicle registration amounts.
- ✓ Charitable contribution amounts, and to which charity they were given to.
- ✓ Amounts of:
 - a. Charitable cash contributions – to which charity
 - b. Charitable non-cash contributions- to which charity
 - c. Unreimbursed employee expenses such as: union dues, supplemental dues, uniforms and protective clothing.
- ✓ If you have work related miles driven, please provide me with:
 - a. Make and Model of vehicle.
 - b. When vehicle was placed in service.
 - c. Number of business miles driven.
 - d. Odometer reading on Jan 1 2006, and Dec 31 2006.

Once I have received this information, I will have a brief 10-15 minute interview with you on the telephone to make sure all bases have been covered and no information is left out.

TAX PLANNER 2006

Page 2

PERSONAL INFORMATION:

Name: _____ SSN: _____ DOB: _____

Spouse's Name: _____ SSN: _____ DOB: _____

Home Phone: _____ Work Phone: _____ Cell: _____

DEPENDENT INFORMATION: (IF APPLICABLE)

Name: _____ SSN: _____ DOB: _____

Name: _____ SSN: _____ DOB: _____

Name: _____ SSN: _____ DOB: _____

INCOME INFORMATION

Simply Include copies of all w-2's, 1099's, K-1's, etc.

DEDUCTIONS:

Auto Registration amounts: _____

Mortgage Interest amount: _____

Property Tax Amount: _____

Charitable Contribution amount (Cash): _____

Charitable Contribution amount (non-cash): _____

Unreimbursed employee expenses: _____

Vehicle Information including make, model, date placed in service, number of miles driven (personal and business), odometer readings at Jan 1 2006, and Dec 31 2006:
