Gardner's Tax Service
Post Office Box 3001• Beaumont, CA • 92223
Phone: (909) 446 7051 Fax: (909) 693 5072
www.GTSpros.com

Full Name (as is on your social security card): _____

Birthday: _____ email: _____

Phone Number: _____ Job Title: _____

Appointment Time and Date: _____

Please Bring the Following Information that Applies to You

1.)	Driver's License, Social Security Card and Birth Dates for all those on your tax return
2.)	All Copies of W-2's and any 1099 Income Reporting Statements, including interest from savings, gambling winnings, prizes, awards,etc.
3.)	All forms reporting Pension and Social Security Benefits
4.)	Any 1099's or other document stating "Important Tax Information enclosed"
5.)	Worksheets summarizing business or rental income and expense
6.)	All mortgage interest statements, including any refinanaced or paid off
7.)	Escrow Settlement Statement for property bought or sold
8.)	Student Loan Interest Statement
9.)	Last Year's Tax return for **New Clients**

Medical Expenses		Miscellaneous		Interest Paid	
$		$		$	
	Prescription Drugs		Union Dues		Home Mortgage
	Insurance Premium		Tax Prep Fee		Home Mortgage
	Doctor Visits		Education Expenses		If paid to an Individual
	Dentist Visits		Job Seeking Expenses		
	Hospital Expenses		Professional License		
	Glasses		Journals-Magazines		
	Hearing Aids		Safety Equipment		
	Batteries		Tools/Supplies		
	Miles		Safe Deposit Box		
			Investment Expenses		
Taxes			Uniform Costs		
	Payments to State		Business Mileage		
	Real Estate		Business Travel		
	Time Share		Business Meals		
	Personal Property		Gambling Losses		
	Auto License-DMV		Moving Expenses		
	Other:		Charitable Contributions		

Miscellaneous Important Information

Sales Tax: Please know amount of sales tax paid on major purchases (autos, watercraft, motorcycles, etc.)
Home Purchase or refinance: Please bring Closing Settlement Statements from Escrow
Child Care: Please provide Name, Address, Phone Number, Social Security Number or Federal ID Number, and the amount paid for the Child Care provided
Education; All qualifying educational expenses for yourself, spouse, or dependents
Direct Deposit: Bank Name, Routing Number, Account Number, and indicate **savings** or **checking** account