

LB TAX & BUSINESS ADVISORS, LLC

"THE PREMIER ~~TAX~~ COMPANY"

Proudly Serving: Atlanta, GA Houston TX, Nashville, TN New Orleans, LA
and Las Vegas, NV for over 24 years in Business!

CUSTOMER DATA SHEET

To ensure optimum tax service, always maintain accurate records and to STAY WITHIN IRS GUIDELINES, LB Tax & Business Advisors, LLC. requires all customers to complete this form ANNUALLY.

REFERRED BY (Last Name, First Name) _____

Were you a client of LB Tax & Business Advisors, LLC. last year or prior years? **YES OR NO.**

*PRIMARY NAME _____ *SSN _____ *BIRTHDATE _____

OCCUPATION _____ E-MAIL ADDRESS _____

ADDRESS _____ CITY, STATE, ZIP CODE _____

*PHONE (Cell) _____ (Home) _____ (Work) _____

*SPOUSE NAME _____ *SSN _____ *BIRTHDATE _____

OCCUPATION _____ E-MAIL ADDRESS _____

*PHONE (Cell) _____ (Home) _____ (Work) _____

| Dependent's Name (first, initial and last name) | Social Security Number | Relationship | Date of Birth (MDY) |
|---|------------------------|--------------|---------------------|
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Child Care Information (Note: If there is more than one Provider, please attach the additional information on a separate sheet.)

1. SSN/EIN _____ Provider's Name _____
Provider's Address _____ State, Zip _____ Annual Amount Paid \$ _____

Please check all of items that are applicable to the primary or spouse of the return.

- Do you own a Home or Rental Property?
- Did you receive Unemployment?
- Did you get the 1st and 2nd Stimulus? Amount for 1st Stimulus _____ Amount for 2nd Stimulus _____
- Do you have Educational expense?
- Do you own a Business? Yes No (C-Corp S-Corp LLC Partnership Sole Proprietor)
- Do you have any outstanding debts? (Defaulted student loans, prior year back taxes, back child support, etc.)
- Did you have any Virtual Currency during Tax Year 2020?

1) Bank Name _____ Routing# _____ Account # _____ Ckg or Svg

Credit card number _____ Exp _____ Code _____

I attest that all information that is given on this data sheet and to the preparer is true and accurate to the best of my knowledge and is subject to possible IRS or State review. I understand that I am solely responsible for all fees which are due at the time of service no later than 30 days after transmission of information to the IRS. LB Tax & Business Advisors, LLC. will take all necessary steps required to collect outstanding debts (including reporting to our collection dept. via your SSN). **I agree to pay a \$50 fee at the time of service, once my data has been entered, if I decide not to have my Tax Return prepared by LB Tax & Business Advisors, LLC.**

X _____

Primary's Signature

Date

X _____

Spouse's Signature

Date

PERSONAL DATA

- Social Security Cards (including self, spouse, & dependents)
- Driver's License or ID Card
- Child Care Provider: Name, Address, Tax ID# or SSN, & Amount Paid
- Education Expense: 1098T
- Prior Year Taxes

EMPLOYMENT & INCOME DATA

- W-2 forms for this year
- Unemployment compensation: Form(s) 1099-G
- Miscellaneous income including rent: Form(s) 1099-MISC
- Pensions and Annuities: Form(s) 1099-R
- Social Security Benefits: Form(s) SSA 1099
- Partnerships & S Corporations: Schedule K-1
- State and Local Income Tax Refunds: Form(s) 1099-G
- Gambling and Lottery winnings: Form W-2G
- Interest Income: 1099 INT
- Dividend Income: 1099 INT
- Proceeds from Stocks: 1099-B
- Sale of Home Income (Loss): 1099-B
- Cancellation of Debt: 1099-C
- Bankruptcy: 1099-A
- Tip / Other Income

ITEMIZED DEDUCTIONS

- Mortgage Interest Statement: Form(s) 1098
- Real Estate Taxes Paid
- Personal Property Taxes: Ad Valorem
- Charitable Donations
- Church Tithes & Offering
- Unreimbursed Job Expenses
- Unreimbursed Medical Expenses
- Current year settlement statement (purchase of new home/refinance)

ADJUSTMENTS

- Student Loan Interest Paid
- IRA Contributions
- Early Withdrawal Penalties
- Moving Expenses
- Tuition and Fees

SELF-EMPLOYMENT DATA

- Business Income: Form(s) 1099 MISC and/or own records
- Partnership Income: Schedule K-1/Corporation income
- Business-related expenses: receipts and other documents
- Employment taxes & other estimated business taxes paid for current tax year Tax ID number or Incorporation papers