

CLF CONSULTING SERVICES, LLC

INCOME TAX INFORMATION SHEET

Please check off each item that applies to you and include with your tax documents:

- W-2 Forms (Wages, Pension, Gambling Winnings) ____.
- 1098 (Mortgage Interest Paid) ____.
- 1099 B (Stock Proceeds, Profit Sharing) ____.
- 1099 DIV (Dividend Income) ____.
- 1099 G (Unemployment Compensation, State Tax Refunds) ____.
- 1099 INT (Interest from Checking / Savings Accounts) ____.
- 1099 MISC (Income Received from Self Employment and Other Sources) ____.
- 1099 R (Distributions from Pensions and Retirement Accounts) ____.
- 1099SA (Distributions from a Health Savings Account) ____.
- SSA-1099 (Social Security Benefits) ____.
- Schedule K-1 (Income Received from Partnerships, S-Corporations and Other Sources) ____.

OCCUPATION

YOU AND DEPENDENTS

First Name, Last Name, Address, Date of Birth Soc. Sec. Number Relationship

Please Fill in Amounts:

Business Income: \$ _____.

Please attach a list of all expenses associated with your Business.

Rental Income: \$ _____ . (List each Property Separately)

Please attach a list of all expenses associated with your Rental Property.

Property Taxes Paid: \$ _____ . **Advalorem Taxes** (Car Registration): \$ _____

Charitable Contributions (Name, Address, Contribution or Donation: \$ _____.

ChildCare Paid: \$ _____ .

Estimated Tax Payments Federal: \$ _____.

Estimated Tax Payments STATE: \$ _____.

Stimulus Payment: \$ _____ .

Please Review all of your Tax Documents to be sure that you include ALL INCOME EARNED IN TAX YEAR. Also, include a copy of a voided check if you would like direct deposit.

If you have any questions or need assistance, please call me at (770) 413-7600.

Sincerely,

Cedric L. Floyd, EA
Managing Partner
CLF

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