



**INCOME TAX QUESTIONNAIRE**

**DATE:**

Name:	New Client <input type="checkbox"/> Old Client <input type="checkbox"/>
Date of Birth:	Would you like direct deposit?
Social Security Number:	ABA Routing #:
Drivers License #:	Account #:
Profession/Job Title:	
Street Address:	Spouse's Name:
City, State, Zip:	Date of Birth:
Home Number:	Social Security Number:
Cell Number:	Drivers License #:
Email:	Profession/Job Title:
<b>DEPENDENTS</b>	
Name:	Name:
Date of Birth:	Date of Birth:
Social Security #:	Social Security #:
Relationship:	Relationship:
Name:	Name:
Date of Birth:	Date of Birth:
Social Security #:	Social Security #:
Relationship:	Relationship:
<b>REAL ESTATE ( Provide Settlement Statement for new purchases or refinanced property)</b>	
Mortgage Interest – Primary:	Mortgage Interest – Investment:
Property Taxes:	Property Taxes:
	Other Rental Expenses:
	Rental Income:
Mortgage Interest – Investment:	Mortgage Interest – Investment:
Property Taxes:	Property Taxes:
Other Rental Expenses:	Other Rental Expenses:
Rental Income:	Rental Income:
<b>MEDICAL EXPENSES</b>	
Prescriptions:                      Doctors:	Dentists:                      Hospitals:
Medical Equipment:                      Glasses:	Health/Dental Insurance:
<b>EMPLOYMENT EXPENSES</b>	
Union/Professional Dues:	Uniforms/Protective Equipment:
Seminars/Continuing Education:	Job Search Costs:
Books/Subscriptions:	Equipment/Tools:
Parking Tolls:	Number of Miles:                      Per:
<b>MISCELLANEOUS EXPENSES</b>	
Legal Fees:                      Sales Tax Paid:	Immigration Employment Fees:
Safe Deposit Box:	Tax Preparation Fees:
<b>CHILD CARE</b>	
Provider Name:	Tax ID:
Address:	Amount Paid:
<b>ADULT EDUCATION/COLLEGE EXPENSES: (Per student)</b>	
Tuition:	Books:                      Fees:
<b>DONATIONS</b>	
Charitable Organizations:	Other Donations:
<b>OTHER</b>	
Investment/Stock Market Trading:	Profession Specific Expenses:
Gambling Income:	Gambling Loss:

**Submit a completed copy of this form in person, fax 305-387-8176, or email [info@kerrkerr.com](mailto:info@kerrkerr.com)**