



Foothills

INCOME TAX SERVICE

P. O. Box 431, New Hartford, CT 06057

Phone: (860) 738-1040

Only complete if there are any changes from your 2021 Income Tax filing through us.

| TAXPAYER |
|----------------|
| Name: |
| SS#: |
| Date of Birth: |
| Occupation: |

| SPOUSE |
|----------------|
| Name: |
| SS# |
| Date of Birth: |
| Occupation: |

| | | | |
|------------|-------|--------|------|
| Address: | City: | State: | Zip: |
| Telephone: | Cell: | Email: | |

CHILDREN AND OTHER DEPENDENTS

| | | | |
|-------|------------|---------------|------|
| Name: | Birthdate: | Relationship: | SS#: |
| Name: | Birthdate: | Relationship: | SS#: |
| Name: | Birthdate: | Relationship: | SS#: |

THESE APPLICABLE INCOME STATEMENTS ARE REQUIRED FOR THE PREPARATION OF YOUR TAX RETURN:

- W-2 wage statements
- W-2G gambling winnings
- 1099-R for Pensions, IRA's or Annuity Distributions
- 1099-Misc, NEC forms for self-employment and various other types of income
- 1099-Int, Div and B including brokerage year-end statements for Interest, Dividends, Stocks, bonds Etc
- 1099-G for Government Payments (Unemployment-may require downloading from state website)
- 1099-SS – Social Security benefits received
- Schedule K-1 forms from Partnerships, Corporations, Trusts or Estates
- Form 1095-A Access Health Insurance Premiums
- ANY other INCOME received

Deduction Organizers are available in our office or at www.foothillstax.com

If you are a new client, please bring a copy of your previous year's tax return.