



# 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 prior income tax filing through us.**

| TAXPAYER       | SPOUSE         |
|----------------|----------------|
| Name:          | Name:          |
| SS#:           | SS#            |
| Date of Birth: | Date of Birth: |
| Occupation:    | 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](http://www.foothillstax.com)**

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