

2018

**INCOME TAX QUESTIONNAIRE**  
**RUSSELL M. KHEDERIAN**  
**CERTIFIED PUBLIC ACCOUNTANT**  
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2018

Taxpayer's Name \_\_\_\_\_ Soc. Sec. No. \_\_\_\_\_

Spouse's Name \_\_\_\_\_ Soc. Sec. No. \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

	<u>Occupation</u>	<u>D.O.B</u>	<u>Phone (H)</u>	<u>Phone (B)</u>	<u>Phone (cell)</u>	<u>Email Address</u>
Taxpayer's Information	_____	_____	_____	_____	_____	_____
Spouse's Information	_____	_____	_____	_____	_____	_____

**DEPENDENTS:**

<u>Name</u>	<u>Soc. Sec. No.</u>	<u>D.O.B.</u>	<u>School student for 5 months?</u>	<u>Does dependent live at home?</u>
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____
4. _____	_____	_____	_____	_____
5. _____	_____	_____	_____	_____

**IMPORTANT NOTE: PLEASE MAKE SURE THAT THE NAME FOR YOU, YOUR SPOUSE AND YOUR DEPENDENTS IS EXACTLY THE SAME AS REPORTED ON YOUR SOCIAL SECURITY CARD.**

- If dependents had interest/dividend/W-2 income under their own Social Security number, please bring along these 1099's/W-2's. **(Do not include this information on page 2, 3 or 4).**
- Do you wish to designate \$3.00 for the Presidential campaign fund? (This will not affect your tax return).  
 Yes \_\_\_ No \_\_\_

To the best of my knowledge and belief, the information included in this questionnaire is true, correct, and complete.

\_\_\_\_\_  
Signature of Taxpayer

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Spouse

\_\_\_\_\_  
Date

**W-2 INCOME**

**\*BRING ALL W-2'S TO OUR MEETING\***

**TAXPAYER:**

1. Name of Employer # 1: \_\_\_\_\_

2. Name of Employer # 2: \_\_\_\_\_

3. Name of Employer # 3: \_\_\_\_\_

**SPOUSE:**

1. Name of Employer # 1: \_\_\_\_\_

2. Name of Employer # 2: \_\_\_\_\_

3. Name of Employer # 3: \_\_\_\_\_

**INTEREST INCOME**

(NOTE: BOX # REFERS TO BOX # ON 1099 INT FORMS)

**TAXABLE:**

**ATTACH ALL 1099'S**

<u>Payer:</u>	<u>Box 1 Interest</u>	<u>Box 2 Early w/d</u>	<u>Box 3 US Savings</u>	<u>Box 4 Fed w/h</u>	<u>Box 11 Bond Prem</u>	<u>Box 13 Bond Prem(t/e)</u>
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

**NON-TAXABLE:** (such as municipal bond interest)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

At any time in 2018 did you have a financial interest in or signature authority over financial accounts with an aggregate value of \$10,000 or more located in a foreign country? Yes \_\_\_\_\_ No \_\_\_\_\_

**If yes, you must file FinCen Form 114 by April 15, 2019 with the United State Treasury.**

