

INCOME TAX QUESTIONNAIRE
RUSSELL M. KHEDERIAN
CERTIFIED PUBLIC ACCOUNTANT
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2019

2019

Taxpayer's Name _____ Soc. Sec. No. _____

Spouse's Name _____ Soc. Sec. No. _____

Address _____

	<u>Occupation</u>	<u>D.O.B</u>	<u>Best Contact Number</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'S</u>
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

NON-TAXABLE: (such as municipal bond interest)

At any time in 2019 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, 2020 with the United State Treasury.

