



DP Financial & Tax, Inc.

8282 S. Memorial Dr, Suite 102 • Tulsa, OK 74133

Phone: (918) 392-7879 • Fax: (918) 392-7079

CLIENT INFORMATION ORGANIZER

FILL OUT BEFORE MEETING	First / Middle / Last	First / Middle / Last
	Name	Name
CELL #	SSN - -	SSN - -
HOME #	Occupation	Occupation
	Date of Birth - -	Date of Birth - -

EMAIL	EMAIL
ADDRESS	CITY ST ZIP

DEPENDENT INFORMATION

Full Name (first name, middle initial, last name)	Social Security Number	Date of Birth	Day Care Exp Paid Y/N?	# Months Lived with Taxpayer	Education Tuition / Fees Paid Y/N?
(New Child)					

GENERAL QUESTIONS

Y	N	Did your marital status change in 2009?	Y	N	Moving Expenses - Did you move? (50 Miles +)
Y	N	Has your address changed? Multiple states?	Y	N	Educator Expenses - (K-12 up to \$250) \$ _____
Y	N	Can anyone claim you as a dependent?	Y	N	Jury Duty \$ _____
Y	N	Do you have adoption expenses?	Y	N	Gambling Winnings: include \$ <u>not</u> on W-2G \$ _____
Y	N	Are you planning to retire this year?	Y	N	Daycare Expenses Paid?
Y	N	Did you sell your home in 2009?	Y	N	Education/ Tuition Expenses?
Y	N	Did you buy a home in 2009 or plan to in 2010?	Y	N	Other taxes paid in current year for prior years?
Y	N	First-Time Homebuyer Credit claimed on 2008 return?	Y	N	Retiree Economic Recovery Payment Rec'd (\$250 max): \$ _____
Y	N	If yes to 2008 homebuyer credit , do you still use the home as your principal residence?	Y	N	Alimony Paid: \$ _____ Recipient SSN: - -
Y	N	Can a different taxpayer try to claim a child listed above as a dependent?	Y	N	Early Withdrawal – 401(k), IRA, or other retirement? Reason: _____
Y	N	Do you claim dependents under a divorce decree or separation agreement?	Y	N	If we did not prepare your return last year, do you have a copy of last year's tax return available?
Y	N	Was there a death of spouse or dependent in current tax year?	Y	N	Any energy efficiency improvements to your main home or purchase a car that qualifies for a credit?

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FILING STATUS		
<input type="checkbox"/> Single	<input type="checkbox"/> Married Filing Jointly	<input type="checkbox"/> Married Filing Separately
<input type="checkbox"/> Head of Household	<input type="checkbox"/> Qualifying Widow(er)	
BANK DIRECT DEPOSIT INFO	Checking _____	Savings _____
Bank	Routing #	Account #

INCOME SOURCES - Please also provide amounts that were not reported on a Form 1099 or any other tax document.					
	W2 – State ___	Y / N	S-Corporation - K1	Y / N	Foreclosure (1099-A, 1099-C)
	1099 (MISC, B, INT, DIV, SA)	Y / N	Partnership - K1	Y / N	Cancelled debts (1099-A)
	1099 (MISC, B, INT, DIV, SA)	Y / N	Trust - K1	Y / N	Unemployment (1099-G)
	Social Security (SSA-1099)	Y / N	Rental Property Income	Y / N	State Refund (1099-G)
	IRA Distributions (1099-R)	Y / N	Royalty Income	Y / N	Alimony Received
	Pension (1099-R)	Y / N	Farm Income	Y / N	Did you Exercise Options?
	Self Employed (1099-Misc)	Y / N	FA Client – print tax forms	Y / N	Other: _____

NOTES:

SCHEDULE A or L					
	New Car Sales Tax*		Medical Ins. Premiums		Tax Prep Fees
	Real Estate Taxes*		Doctors / Hospital		Union Dues
	Mortgage Interest		Dental		Casualty Loss
	Mortgage Points Paid		Eye Glasses		Safe Deposit Box
	Charity – Cash		Prescriptions		Investment Advisor Fees
	Goodwill – Non Cash		Medical Miles		Unreimbursed Exp (2106)
	Charitable Miles		LTC Insurance		Disaster Area Loss (Sch L)

***For 2009 New Car Sales Tax & Real Estate Taxes paid will be deductible on Sch. L as part of the STANDARD DEDUCTION.**

SCHEDULE D – Sales of Stocks, Bonds, Real Estate					
Stock Name	Shares	\$ Purchased	Date Purchased	\$ Sold	Date Sold

Note: You will receive 1099-B or 1099-S

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SCHEDULE E – See Rental Property Worksheet

1. Did you buy a new rental property this year?	(Need HUD)	Yes _____	No _____
2. Did you sell a rental property this year?	(Need HUD)	Yes _____	No _____

MISCELLANEOUS EXPENSE ITEMS

Student Loan Interest - Taxpayer \$_____ Spouse \$_____		No _____
Education Expenses:	Tuition & Fees	\$ _____ No _____
Student: _____	Books & Course Materials	\$ _____
Year: _____	FT or PT Student?	
University Located in Midwestern Disaster Area?	Y / N (Get additional expenses)	\$ _____
Education Expenses:	Tuition & Fees	\$ _____
Student: _____	Books & Course Materials	\$ _____
Year: _____	FT or PT Student?	
University Located in Midwestern Disaster Area?	Y / N (Get additional expenses)	\$ _____
KEOGH, SEP, or SIMPLE – Reirement Plan Contributions		No _____
Taxpayer \$_____	Please circle one: Keogh / SEP / SIMPLE	
Any taxable distribuitions received after 2006 & before due date of '09 return?	Y / N	\$ _____
Spouse \$_____	Please circle one: Keogh / SEP / SIMPLE	
Any taxable distribuitions received after 2006 & before due date of '09 return?	Y / N	\$ _____
IRA Contributions		No _____
Taxpayer \$_____	Please circle one: Traditional / ROTH	
Any taxable distribuitions received after 2006 & before due date of '09 return?	Y / N	\$ _____
Spouse \$_____	Please circle one: Traditional / ROTH	
Any taxable distribuitions received after 2006 & before due date of '09 return?	Y / N	\$ _____
Child Care Expenses – Name of Child _____	SSN# _____	\$ _____
Name of Child _____	SSN# _____	\$ _____
Care Provider _____	Tax ID # _____	
Address _____		
HSA – 1. Family or Single Plan? 2. Self Paid or Employer Paid?	'09 Contribution	\$ _____
3. Since what date have you been eligible to make contributions? _____		
4. HSA Deductible Amount \$_____ 5. Qual medical expenses \$_____	'09 Distribution	\$ _____

