For new clients, please complete all relevant information. (Mark non-applicable items with N/A)
For existing clients, please complete items where there may be a change to prior year information

PERSONAL INFORMATION

	Taxpayer	Spouse
Social Sec Number		
First Name, Middle Initial		
Last Name		
Occupation		
Date of Birth		
Date of Death		
Work Phone		
Home Phone		
Cell Phone		
E-mail		

Home Address

Address ______________________
Apt Number ______________________
City, St, Zip ______________________

Mailing Address(if different)

Address ______________________
Apt Number ______________________
City, St, Zip ______________________

LONG & ASSOCIATES PUBLIC ACCOUNTANTS, INC.
300 S Ninth, Ste 103
Salina, KS 67401
785-309-1515 phone
785-309-1616 fax
www.long-pa.com

DEPENDENT INFORMATION

First, MI and Last Name	Date of Birth	Social Sec Number	Relationship	Months at home	Child Care Expenses
John H Doe	*03/11/04*	*111-22-3333*	*Son*	*12*	*$1,000*

If you have child care expenses, please provide name, address and SSN or EIN of provider.

DIRECT DEPOSIT OF REFUND/WITHDRAWAL OF AMOUNT DUE (please provide a voided check)

If applicable, I authorize:
Direct Deposit of my federal and state income tax refund. Y / N

Electronic Withdrawal of my federal and state income tax liability. Y / N

BANK NAME ______________________ ROUTING NUMBER _____________ ACCOUNT NUMBER _________________

NEEDED DOCUMENTS AND RELEVANT QUESTIONS

- ☐ Tax Returns for prior 3 years **(for new clients)**
- ☐ Any tax documents received (W-2s, 1099s, 1098s, etc)
- ☐ Do you own your home? Y / N
- ☐ Did you purchase a new vehicle in 2009? Your sales tax may be deductible. Y / N
- ☐ Did you purchase a home in 2009? You may qualify for a housing credit. Y / N
- ☐ Are you or any of your dependents attending college or other type of post-secondary education? Y / N
- ☐ Have you itemized in the past, or do you think you may be able to itemize in 2009? Y / N
- ☐ Have you made any changes in your home that may qualify for the energy credit? Y / N
- ☐ Do you contribute to any retirment plan other than an employer-sponsored plan? (Roth IRA, IRA, 529 Plan, etc) Y / N
- ☐ Do you make estimated tax payments? Y / N
- ☐ In the past, have you qualified for the Kansas Homestead Refund? Y / N

If you answered yes to any of the above questions, please complete page 2 of this form.

I believe the information I have presented is true and correct to the best of my abilities. I further understand and authorize that as a client of Long & Associates Public Accountants, Inc. I will be e-filing my tax returns.

Taxpayer ______________________ Date   Spouse ______________________ Date

DETAILED INFORMATION WORKSHEET

Please provide documentation to support your answers below.

Do you own your home? For 2009, the property tax you paid on your personal residence may be deductible even if you do not itemize.

Please provide the amount of property tax you paid in 2009 on your home. $________________

Did you purchase a new vehicle in 2009? Your sales tax may be deductible.

Please provide the amount of sales tax paid. $________________

Did you purchase a home in 2009? You may qualify for a homebuyer credit

What was the purchase date of your new home? ________________

Is this home your new primary residence? Y / N

Was this your first home? Y / N

If this was not your first home, what was the pruchase date of your prior home? ________________

Please provide us with your HUD closing statement for the home you purchased.

Are you or any of your dependents attending college or other type of post-secondary education?

The education institution that is being attended should provide you with a 1098-T which will indicate the amount of qualifying expenses paid in 2009, and the amount of scholarships that mey have been received. Please be sure to provide us with the 1098-T. In addition, please provide us with a summary report of tuition and expenses paid, this report is available on-line with most institutions.

First, MI and Last Name	Year in school	Tuition & Books Paid	Scholarships Received	Institution

Have you itemized in the past, or do you think you may be able to itemize in 2009?

Medical		Mtg Interest		Dues/Licenses	
Medical Ins		2nd Mortg Int		Uniforms	
Med Miles		Charitable Contributions		Safety Deposit Box	
RE Tax - 2nd Home		Non-Cash Contributions		Casualty Loss	
Car Tax		Charitable Miles		Home Office	
Other Tax		Investment Fees		Gambling Loss	

Have you made any changes in your home that may qualify for the energy credit?

Please note any energy improvements (such as windows, siding, furnace, A/C, etc) you may have made to your home and the cost.

Do you contribute to any retirment plan other than an employer-sponsored plan? (Roth IRA, IRA, 529 Plan, etc)

Please note the plan type, contributions made for 2009 and date of contributions

Do you make estimated tax payments?

	2008 Overpayment	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
Federal					
Kansas					
Other					

☐ Please check here if you would like us to make estimated payment coupons for you. Estimates will be made based upon your 2009 liability.

In the past, have you qualified for the Kansas Homestead Refund?

If you do not own your home please provide us with the amount of rent paid in 2009. $________________

If you have other income, such as a business, farm or rental please complete the appropriate attached schedules.