

STANLEY & ASSOCIATES, INC. CUSTOMER INFORMATION SHEET

NAME: _____ SSI# _____ DOB _____

ADDRESS: _____

CITY: _____ STATE: _____ COUNTY: _____

PHONE: _____ WORK: _____ CELL: _____

SPOUSE: _____ SSI# _____ DOB _____

STATUS: Single _____ Married/Filing Joint _____ Married Filing Separate _____

Separated _____ Qualifying Widow/er: _____ (Date of spouse death _____)

DEPENDENTS

<u>FULL NAME</u>	Date of Birth	SSI#	Relationship	Number of Months Lived With
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INCOME & EXPENSES DOCUMENTS:

- W-2 – Wage Statements
- 1099-DIV/INT – Dividend Interest
- 1099-R – Pension Retirement
- 1099-MISC – Self employment Income
- 1099-G – Unemployment Income
- SSA-1099 – Social Security Income
- 1099-B – Sales of Stocks or Bonds

Expenses:

- Real Estate Taxes and Personal Property Taxes Paid
- Mortgage or Home Equity Loan Interest Paid – Form 1098
- Medical Expenses
- State and Local Taxes paid
- Educator Expenses
- Tuition and Education Fees Form 1098-T
- Student Loan Interest – form 1098 E
- Charitable Donations

FOR FILES PLEASE FORWARD COPY OF DRIVERS LICENSE & CANCELLED CHECK FOR E-FILE

Fax to (914) 654-1105