

Floyd Green Financial Services, Inc.

770-457-2550

Tax Items Requested

Previous Year Tax Return

Personal Information

Name and Spouse Name

Social Security Number

Date of Birth

Address

Phone Number

Single, Married, Filing Jointly, etc

Dependents, Relationship, SS #, Date of Birth

Income Documentation

W-2s

Other documentation of Earnings

Unemployment Compensation

Investment Statements, IRA Statements – Form 1099s

Expense Documentation

Loan Statements – Form 1098s

Home Purchase or Refinance (closing statements)

Student Loans

Self Employment Tax Paid

Floyd Green Financial Services, Inc.

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Tax Items Requested

Other Income and Expense

Sale of Real Estate

Other Gains (sale of jewelry, collectibles, etc)

Rental Properties (Income and Expenses)

Businesses Owned

EIN Number

Form of Business

Business Income and Expense

Sale of Business Assets

Business Loans

Home Office Expense (Size of Office / Size of House)
(Cost of House)

Automobile Used for Business

Mileage driven for Business

% of Time Used for Business

Type of Automobile and Date Bought

Date Started Using for Business

Other

Back Taxes Owed?