NEW CENTURY TAX
Client Data Sheet

Please complete the following form online. Print, sign, and attach a copy of last year's Tax Return.
See page 2 for further instructions.

Primary Name_______________________________ Date of birth________________SS#________________________

Spouse Name _______________________________ Date of birth________________SS#________________________

Referred by:____(Referral's phone #)_____________________

How did you hear about us?____

Current Address____City__________________State______ Zip_________

Home Telephone__________________ Cell #_________________ Email Address______________________________

Are you married? ☐ **Yes** ☐ **No** If Yes, did you live with spouse after July 1, 2009? ☐ **Yes** ☐ **No**

DEPENDENTS

Name	Birth Date	SSN	Relationship	Months In Home	Health Ins.
____________________________	___ /___ /______	_______________	___________	________	☐ **Yes** ☐ **No**
____________________________	___ /___ /______	_______________	___________	________	☐ **Yes** ☐ **No**
____________________________	___ /___ /______	_______________	___________	________	☐ **Yes** ☐ **No**
____________________________	___ /___ /______	_______________	___________	________	☐ **Yes** ☐ **No**

Did you file a return in 2008? ☐ Yes ☐ No **Did you attend college?** ☐ Yes ☐ No

Do you own a home? ☐ Yes ☐ No **Do you rent?** ☐ Yes ☐ No
If Yes, what is the monthly cost? _______________

Do you own a business? ☐ Yes ☐ No If yes, type of business or business name
____

How do you want your taxes filed? ☐ RAL - 1 to 2 days ☐ Paper/Mail - 4 to 6 weeks
(Select One) ☐ Efile - 2 to 3 weeks ☐ ERC - 8 to 15 days

How would you like to receive your tax copies? ☐ Printed Copy / Pickup ☐ Email
(*Select one)* ☐ Online Tax Vault

The above information is correct and true to the best of my knowledge.

Signature____ **Date**______________________

Send this completed page along with a copy of your prior year tax return and ALL necessary documentation, (see list below), by fax or mail to the following:

MAIL:
New Century Income Tax
612 Bloomfield Ave
Bloomfield, NJ 07003
Linden, NJ 07003

FAX:
(973) 707-5276

Tel: (973) 707-5274

EMAIL:
info@newcenturyincometax.com

Things you need provide to your tax preparer

- The names and birth dates of everyone in your household (you, your spouse and any children born before the end of the tax year.)
- Proof of ID
- Last year's tax return, if you filed.
- Form W-2s from all of your and your spouse's jobs during the year.
- Records of all other income(bank interest, gambling winnings, prizes, bonuses, etc…)
- If self-employed, bring a detailed, itemized list of your Income (includes 1099-MISC and other income received by cash or check) and Expenses. (i.e. cell phone, mileage log, actual vehicle expenses, travel and entertainment expenses, meals, etc…..)
- Social Security Cards for your children, yourself, your spouse, and all other dependents and family members.
- Student loan interest, childcare expenses, medical expenses, tuition, and any other miscellaneous deductions/income
- Form 1099-G, unemployment statement
- Homeowners bring statements from your mortgage company or home equity loan, and proof of any real estate tax you paid. Also includes amounts contributed to charity. Records of purchase and sale of a personal residence, including the settlement statement from closing (Keep records of all home improvements.)
- Job-related expenses, such as union or professional association dues, work clothing, tools, supplies, job-hunting and job-related education
- Documentation of Amount contributed to an IRA or other retirement plan.
- Records of all income from and expenses paid for rental real estate you own

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If You Can Answer Yes to the Following Questions, You Should Give All Related Documents to Your Tax Preparer

- Did you pay interest on higher education loans?
- Were there any births, deaths, adoptions, divorces or marriages in your household?
- Did you receive tip income?
- Did you receive a notice from the IRS, state or local taxing agency regarding a prior year tax return?
- Did you receive installment payments on property sales?
- Did your children under 14 years of age receive investment income?
- Are you claiming dependents other than your children?
- Did you refinance your mortgage during the year?
- Did you pay points to purchase a home or refinance a mortgage during the year?
- Did you receive money from a lawsuit?