



CYGNET TAX
251 Pawtuxet Avenue
Warwick, Rhode Island 02888
401-942-1040

Drop Off Questionnaire

Client Name: _____ Home# _____
 Spouses Name: _____ Work# _____ T or S
 Address: _____ State _____ Zip Code _____

Please bring the following:

1. Copies of W-2's, 1099's and K-1 forms
2. All year-end lender loan statements including those refinanced or paid off during the year.
3. Settlement statements for properties bought and/or sold.
4. 1099 forms reporting all stock sales for the year as well as the purchase dates and purchase prices.

Name	Date Purchased	Price	Date Sold	Price
_____	_____	\$ _____	_____	\$ _____
_____	_____	\$ _____	_____	\$ _____
_____	_____	\$ _____	_____	\$ _____
_____	_____	\$ _____	_____	\$ _____
_____	_____	\$ _____	_____	\$ _____

5. 1099 forms reporting Unemployment compensation
 Social Security Benefits
 State Tax Refunds
6. Form 5498 reporting all IRA balances in accounts and from 1099 showing IRA withdrawals and rollovers.
7. Social Security numbers of all dependents not previously supplied.
8. New Dependents: **Name:** _____
 Date of Birth: _____
 Social Security #: _____
Name: _____
 Date of Birth: _____
 Social Security #: _____

9. Is there anyone that will not qualify as a dependent this year and must be removed from your tax return:

10. Your federal and state tax booklets, if you have them.

11. To update our database please provide the following.

	Taxpayer	Spouse	Child #1	Child #2
Name:	_____	_____	_____	_____
Date of Birth	_____	_____	_____	_____
SS#	_____	_____	_____	_____

Political Contribution? ____ Yes or ____ No ____ Yes or ____ No

