SAVE TIME AND MONEY

EASY AS 1, 2, 3

Drop Off Your Tax Information

Your time is important. Use our convenient drop off service. With busy schedules and crowded calendars, you're looking for ways to make the most of your day. Save time and use our drop off service. Simply bring your tax documents to one of our 3 convenient offices and we'll take it from there.

Here's how it works:

1. Gather your tax documents such as W-2s, 1099s, mortgage statements, etc.

2. Complete our INTAKE/INTERVIEW & QUALITY REVIEW SHEET and include it an envelope with your tax documents. Drop it off at three convenient locations in the valley.

3. Your tax professional will contact you to go over your documents and schedule an appointment for you to come in for final review and sign.

More questions? Contact us at 702-870-8977 ext 312 to get started

It's Convenient, Easy, Fast and Free!

LOCATIONS:

Main:
3901 W Charleston Blvd
Las Vegas, NV 89102
702-870-8977 ext 312

North:
6512 N Decatur Blvd Ste 130
Las Vegas, NV 89131
702-454-5411

East:
2799 E Tropicana Ave, Ste H
Las Vegas, NV 89121
702-454-7899

email: tax@nevadalegalforms.com

NEVADA LEGAL FORMS & TAX SERVICES, INC.
Intake/Interview & Quality Review Sheet

Thank you for allowing us to prepare your tax return. **You are responsible for the information on your return so please provide complete and accurate information to the tax preparer.** If you have any questions please ask your preparer.

You will need your:

- Tax information such as Forms W-2, 1099, 1098.
- Copies of your Mortgage Statement, Vehicle Registrations, Job Expenses, Gambling Losses, Charitable Contribution Receipts (cash or donated items).
- Social security cards or ITIN letters for you and all persons on your tax return. (Please provide for you and spouse, if applicable)
- Proof of Identity (such as a valid drivers license or other government issued picture ID). (Please provide for you and spouse, if applicable)

PART I. YOUR PERSONAL INFORMATION

1. Your First Name:	M.I.	Last Name:	Are you a U.S. Citizen? ☐Yes ☐No
2. Your Date of Birth:	3. Social Security Number or ITIN:		4. Your Job Title:
5. Spouse's First Name:	M.I.	Last Name:	Spouse a U.S. Citizen? ☐Yes ☐No
6. Spouse's Date of Birth:	7. Social Security Number or ITIN:		8. Spouse's Job Title:
9. Mailing Address:	City:	State:	Zip Code:
10. Contact Information Telephone:	Cell Phone:	E-mail:	
11. Can anyone claim you or your spouse on their tax return? ☐Yes ☐No ☐Unsure			

PART II. MARITAL STATUS AND HOUSEHOLD INFORMATION

12. As of December 31, 2011, were you?

☐ Single

☐ Married: Did you live with your spouse during any part of the last six months of 2011? ☐Yes ☐No

☐ Divorced or Legally Separated: Date of final decree or separate maintenance agreement: ________________

☐ Widowed: Year of spouse's death: ____________________

13. List names below of everyone who lived in your home in 2011 (other than you or spouse). Also list anyone who lived outside of your home that you supported during 2011. If additional space is needed please attach.

First Name:	Last Name:	Date of Birth:	Relationship to you (e.g. daugther, son, mother, sister, none)	Number of months lived in your home in 2011	US Citizen or resident of the US, Canada or Mexico in 2011 (Y/N)	Marital Status as of 12/31/2011 (Single or Married)	Full-Time student in 2011 (Y/ N)	Received less than $3700 income in 2011 (Y/ N)	Disabled? (Y/N)

PART III. INCOME CHECK ALL THAT APPLY AND INCLUDE REQUESTED DOCUMENTS, IF AVAILABLE

Yes	*No*	*Unsure*	*Type of Income*
			Wages or Salary? (Form W-2)
			Tip Income?
			Scholarships? (Forms W-2, 1098-T)
			Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)
			Refund of state/local income taxes? (Form 1099-G)
			Alimony Income?
			Self-Employment payments (such as cash received for services, small business)? (Form 1099-MISC)
			Income (or loss) from the sale of Stocks, Bonds or Real Estate (including your home)? (Forms 1099-S, 1099-B)
			Disability Income (such as payments from insurance or workers compensation)? (Forms 1099-R, W-2)
			Distributions from Pensions, Annuities, and/or IRA? (Form 1099-R)
			Unemployment Compensation? (Form 1099-G)
			Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)
			Income (or loss) from Rental Property?
			Other Income: (gambling, lottery, prizes, awards, jury duty, etc.)

PART IV. EXPENSES CHECK ALL THAT APPLY AND INCLUDE REQUESTED DOCUMENTS, IF AVAILABLE

Yes	*No*	*Unsure*	*Type of Expenses*
			Alimony: If yes, do you have the recipient's SSN? ☐Yes ☐No
			Contributions to a retirement account? ☐IRA ☐Roth IRA ☐401K ☐Other
			Educational expenses paid for yourself, spouse or dependents, such as tuitions, books, fees, etc.? (Form 1098-T)
			Unreimbursed employee business expenses (such as teacher supplies, uniforms or mileage)?
			Medical expenses (including health insurance premiums)?
			Home mortgage interest? (Form 1098)

			Real estate taxes for your home or personal property taxes for your vehicle? (Form 1098)
			Charitable contributions?
			Child/dependent care expenses, such as day-care?

PART V. LIFE EVENTS CHECK ALL THAT APPLY AND INCLUDE REQUESTED DOCUMENTS, IF AVAILABLE

Yes	***No***	***Unsure***	***Type of Life Event***
			Have a Health Savings Account? (Forms 5498-SA, 1099-A, W-2 with code W in Box 12)
			Have debt from a mortgage or credit card canceled/forgiven by a commercial lender? (Form 1099-C)
			Buy, sell or have a foreclosure of your home? (Form 1099-A)
			Have Earned Income Credit (EIC) disallowed in a prior year? If yes, for which tax year? ____________________________
			Purchase and install energy efficient home items (such as windows, furnace, insulation, etc.)?
			Live in an area that was affected by a natural disaster? If yes, where? ____________________________________
			Receive the First Time Homebuyers Credit in 2008?
			Pay any student loan interest? (Form 1098-E)
			Make estimated tax payments or apply last year's refund to your 2011 tax? If so how much?
			Attend school as a full time student? (Form 1098-T)
			Adopt a child?
			File a 2010 federal tax return containing a "capital loss carryover" on Form 1040 Schedule D?

IF YOU ARE DUE A REFUND OR HAVE A BALANCE DUE:

Ask your preparer about Direct Deposit. It is the fastest, easiest way to receive your tax refund. An e-filed return means a fast refund. Taxpayers who combine e-file and Direct Deposit can get their refunds in as few as 10 days.

DIRECT DEPOSIT OR WITHDRAWAL	YES	NO
If you are due a refund, would you like a direct deposit? **(Please leave a voided check for Direct Deposit of Refund)** *Additionally fees may apply*		

The information provided is the best to my acknowledge. I authorize Nevada Legal Forms & Tax Services, Inc. to prepare the proper tax forms on my behalf based on the information provided.

Print Name: _______________________________________ Signature: ____ Date: ____________________