

SwiftTax

Personal Information

Taxpayer:

Last Name _____
First Name _____ MI _____
SSN _____ DOB _____
Occupation _____

Spouse:

Last Name _____
First Name _____ MI _____
SSN _____ DOB _____
Occupation _____

Address _____
City _____ State _____ ZIP _____
Home Phone _____ Cell Phone 1 _____ Cell Phone 2 _____

Federal Filing Status

- Single
 Married filing jointly
 Married filing separately
 Head of household
 Qualifying widow(er) Year the spouse died _____

Dependent Information

First & Last Name	SSN	Relationship	DOB
● _____	● _____	● _____	● _____
● _____	● _____	● _____	● _____
● _____	● _____	● _____	● _____
● _____	● _____	● _____	● _____

Income Information

- W-2 Income _____
 1099 Interest Income _____
 1099 Dividend Income _____
 1099G Unemployment Income _____
 SS Income _____
 Rental Income _____

Expense Information

- 1098E Mortgage Interest Expense _____
- Charitable Contribution _____
- Real Estate Tax _____
- Job Related Expense(Uniform, Mileage etc) _____
- Medical Expense _____
- 1098T Education Expense _____

Business Expenses

- Income _____
- Expenses
 - Advertising _____
 - Car Expenses _____
 - Commissions and fees _____
 - Contract Labor _____
 - Insurance _____
 - Interest _____
 - Legal & Professional services _____
 - Repairs & Maintenance _____
 - Supplies _____
 - Taxes & Licenses _____
 - Travel _____
 - Telephone _____
 - Professional Dues _____
 - Stand dues (taxi) _____
 - Utilities (cell phone etc) _____
 - Gasoline expense _____