

Shaw Mumford & Co., P.C.
Certified Public Accountants & Business Advisors
1564 South 500 West Suite 201, Bountiful, UT 84010
Telephone (801) 294-3155 Fax (801) 294-3190

Taxpayer: _____
 (First) (Middle) (Last) (Birthday) (Social Security Number)

Spouse: _____
 (First) (Middle) (Last) (Birthday) (Social Security Number)

Residence Address: _____ **Business Address:** _____
Residence Telephone: _____ **Business Telephone:** _____
Email Address: _____ **Cell Phone:** _____

Dependent Information

Please provide the following information for dependent children and others that reside in your home that you feel might be qualified to be claimed by you as a dependent

Name	Social Security Number	Birthday	College or Trade School	Year	Tuition	Disabled
			Y / N	Fr Sp Jr Sn		Y or N
			Y / N	Fr Sp Jr Sn		Y or N
			Y / N	Fr Sp Jr Sn		Y or N
			Y / N	Fr Sp Jr Sn		Y or N

Elections

	Yes	No		Yes	No
Apply refunds to next year's estimated tax payments?	<input type="checkbox"/>	<input type="checkbox"/>	Preparer may speak with taxing authorities concerning this return?	<input type="checkbox"/>	<input type="checkbox"/>
Do you wish to electronically file your tax return?	<input type="checkbox"/>	<input type="checkbox"/>	Do you wish to have \$3 of your taxes given to the Presidential Election Campaign fund?	<input type="checkbox"/>	<input type="checkbox"/>

Estimated Tax Payments

Did you make estimated tax payments this year? Yes No

Statutory Date	Federal Payments		State Payments	
	Other Date	Payment Amount	Other Date	Payment Amount
04/15/2010				
06/15/2010				
09/15/2010				
01/17/2011				

IRA Contributions

Will you/have you made any of the following IRA contributions this year?

Traditional IRA- Taxpayer	Amount:	<input type="checkbox"/>	<input type="checkbox"/>
Traditional IRA- Spouse	Amount:	<input type="checkbox"/>	<input type="checkbox"/>
Roth IRA- Taxpayer	Amount:	<input type="checkbox"/>	<input type="checkbox"/>
Roth IRA- Spouse	Amount:	<input type="checkbox"/>	<input type="checkbox"/>

Income/Losses

Do you have any of the following sources of income?

	Yes	No	Attch'd
Commission's 1099's	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Debt Forgiveness (Bankruptcy)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Disability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dividends	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gambling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inheritance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Installment Sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interest- Bank, Etc	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interest- Mortgage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IRA Distributions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Land Sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Partnership/S-Corporation/Trust/Estate (K1)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prizes and Awards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Retirement 1099R	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Royalties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social Security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
State Refunds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stock Sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Uncollectible Debts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unemployment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wages W2's	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Worthless Investments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Income	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other Items

Have any of the following occurred this year?

	Yes	No
Changed Employment	<input type="checkbox"/>	<input type="checkbox"/>
Children under age of 23 with income in excess of \$850	<input type="checkbox"/>	<input type="checkbox"/>
Claimed bankruptcy	<input type="checkbox"/>	<input type="checkbox"/>
Discontinued/Started a business	<input type="checkbox"/>	<input type="checkbox"/>
Early Distributions from IRA/Pension Accounts	<input type="checkbox"/>	<input type="checkbox"/>
Fire, Theft, or Auto Accident	<input type="checkbox"/>	<input type="checkbox"/>
Household Employees	<input type="checkbox"/>	<input type="checkbox"/>
IRS/State Correspondence Received	<input type="checkbox"/>	<input type="checkbox"/>
Loans from Retirement Accounts	<input type="checkbox"/>	<input type="checkbox"/>
Marital Status Changed	<input type="checkbox"/>	<input type="checkbox"/>
Moved - New Mailing address	<input type="checkbox"/>	<input type="checkbox"/>
New Family Members/Dependents	<input type="checkbox"/>	<input type="checkbox"/>
Purchased a new personal residence	<input type="checkbox"/>	<input type="checkbox"/>
Refinanced Home	<input type="checkbox"/>	<input type="checkbox"/>
Sold Home	<input type="checkbox"/>	<input type="checkbox"/>
Purchased a new vehicle	<input type="checkbox"/>	<input type="checkbox"/>
Updated Your Trusts and Wills	<input type="checkbox"/>	<input type="checkbox"/>
Do you own or have control over a foreign bank account?	<input type="checkbox"/>	<input type="checkbox"/>

