

WEITZEL & ASSOCIATES

3304 Sepulveda Blvd. Suite 2 Torrance, CA 90505 (310) 618-0247 Fax (310) 539-5273

E-Mail: CarlTheTaxMan@gmail.com

2012 TAX YEAR QUESTIONNAIRE

GENERAL INFORMATION		Birth Date	Social Security Number	Occupation	
Taxpayer's Name		/ /			
Spouses' Name		/ /			
Address			City	State	Zip Code
Home Phone			Business Phone T / S		
Cellular Number T / S			E-Mail Address		
Dependent's Names	Birth Date	Social Security Number	Relationship	Months in House	
	/ /				
	/ /				
	/ /				
	/ /				
	/ /				

QUESTIONS YOU WANT TO ASK AT YOUR TAX APPOINTMENT

CHILD AND DEPENDENT CARE EXPENSES	Number of Qualifying Children	
Caretaker's Name	Caretaker's Identifying Number	Phone No.
Address		Expenses Paid
Caretaker's Name	Caretaker's Identifying Number	Phone No.
Address		Expenses Paid

ESTIMATED TAX PAYMENTS				
Date Dues	Paid to I.R.S.	Date Paid	Paid to State	Date Paid
Jan. 15, 2013	Payment for the Last Quarter of 2012			
2011 Refund Applied				
April 15, 2012				
June 15, 2012				
September 15, 2012				
January 15, 2013				
Extension Payments		April 15, 2013		April 15, 2013

INCOME

BRING ALL W-2 AND 1099R FORMS

INTEREST INCOME	Amount	PENSION & IRA	Code	Gross Amount	Taxable	Amount Withheld
						/
						/
						/
						/
						/
						/
						/
Penalty For Early Withdrawal		SOCIAL SECURITY INCOME				
Income Tax Withheld		Taxpayer's Amount		(Box 5)	Medicare B	Tax (Box 6)
Any Foreign Business Income	Yes	No	Spouse's Amount			

DIVIDEND INCOME	Bring All 1099's	Ord. Inc. (Box 1a)	Qualified Div. (Box 1b)	Capt. Gains (Box 2a)	Non-Div (Box 3)	Tax Withheld (Box 4)	Foreign Tax (Box 6)

PARTNERSHIP, ESTATE, AND TRUST INCOME	Bring All K-1's
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MISCELLANEOUS INCOME	(Bring All Related Forms)		
Unemployment Received	T / S	Gambling Winnings	
Alimony Received	T / S	Prior Year State Refund	
Lottery Winnings	T / S	Barter Income	
Jury Duty	T / S		

SALE OR EXCHANGE OF STOCKS, OR OTHER PROPERTY				
Description of Stock Sold	Date Bought	Date Sold	Sales Price	Cost

Your Pre-Scheduled Tax Appointment is set for:

DAY DATE

TIME

AM
PM

This appointment is set for your convenience. If you would prefer another time, please call and a time that is more convenient for you will be scheduled. If you need to cancel, please call 24 hours prior to your appointment.

Mail

Send in this completed questionnaire. If I have any questions, I will call. Your completed return will be mailed to you ready for signature and mailing before 4/10.

**Call or
Drop Off**

Give us a call to schedule your tax appointment at a date and time that is convenient for you. Or you can drop your information by the office at your convenience.

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Office Location

The office is located just east of the intersection of Madrona Ave. and Sepulveda Blvd., behind the China Tea House restaurant.

**** Year-Round Service ****

**** Tax Planning and Financial Counseling ****

**** Investments: Mutual Funds, Limited Partnerships ****

**** Returns Prepared by an Enrolled Agent ****
Licensed to practice before the Internal Revenue Service

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