



Foothills

INCOME TAX SERVICE

P. O. Box 431, New Hartford, CT 06057 Phone: (860) 738-1040

COMPLETE ONLY IF THERE ARE ANY CHANGES FROM YOUR PRIOR INCOME TAX FILING THROUGH US.

TAXPAYER		SPOUSE	
Name:		Name:	
SS#:		SS#	
Date of Birth:		Date of Birth:	
Occupation:		Occupation:	
Address:	City:	State:	Zip:
Telephone:	Cell:	Email:	

CHILDREN AND OTHER DEPENDENTS

Name:	Birthdate:	SS#:
Name:	Birthdate:	SS#:
Name:	Birthdate:	SS#:
IRA Contributions:		Education Expenses:

In the event you are due a refund, please provide your direct deposit information: Circle one: Checking or Savings
Routing: _____ Account: _____ Bank Name: _____

THESE ARE SOME OF THE ITEMS THAT WE WILL NEED FOR THE PREPARATION OF YOUR TAXES:

- Copy of all W-2's for Wages
- Copy of all W2-P or 1099's for Pensions, IRA's or Annuity Distributions
- Copy of all W2-G's for Gambling Winnings
- 1095-A for Subsidized Health Insurance, CT Access Health- Not CT Husky
- 1099-SA For HSA/MSA Distributions. Form 5498-SA for Contributions
- 1099-G for Government Payments including Unemployment, Taxable Refunds and Paid Leave
- 1099 Forms for Interest, Dividends, Stock Sales, and Brokerage Accounts
- SSA –1099 Social Security Benefits, Disability and Railroad Retirement.
- 1099-K Third Party Payments
- Schedule K-1 Forms for Partnerships, Corporations, Trusts or Estate Income
- Energy Efficient Primary Home Improvement, EV Purchase Receipts
- Charitable Contribution Receipts
- ANY other INCOME received

Applicable Printable Deduction Organizers are available on our website.

If you are a new client, please bring a copy of your previous year's tax return.