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*Alternative Financial and
 Tax Services
 Delivering Sustainable Services!*

*We welcome your business to provide financial service assistance
 and establish rewarding, professional relationships!*

Annual Tax Information: (2017)

#W2's: _____ #1099's: _____

Primary Name: _____

Address: _____

City, State, Zip: _____, _____, _____

Social Security #: _____ Date of Birth: _____

Email address: _____ Occupation: _____

Filing Status: Single ___ Married/Joint ___ Married/Separate ___ Head of Household ___

*E-File or Mail in Tax Preparations – please complete all pages of this document. Scan and email all applicable documents and expense items / totals, with complete tax information to: info@afandtservices.com. Or please have all applicable documents completed, for your scheduled appointment.

Phone numbers: Home: _____ Cell: _____

Best time to contact: Afternoon: _____ Evening: _____ Weekends: _____

Required tax documents: Identification, income documents (W-2 and 1099 forms), and itemized taxable deductions.

Dependent #1: _____ Social Security #: _____ DOB: _____

Relationship: Son ___ Daughter ___ Niece ___ Nephew ___ Grandchild ___ Uncle ___ Aunt ___

Dependent type: _____ (I.e. Child at home; college; or other dependent)

Dependent #2: _____ Social Security #: _____ DOB: _____

Relationship: Son ___ Daughter ___ Niece ___ Nephew ___ Grandchild ___ Uncle ___ Aunt ___

Dependent type: _____ (I.e. Child at home; college; or other dependent)

Dependent #3: _____ Social Security #: _____ DOB: _____

Relationship: Son ___ Daughter ___ Niece ___ Nephew ___ Grandchild ___ Uncle ___ Aunt ___

Dependent type: _____ (I.e. Child at home; college; or other dependent)

Annual – Child Care Expenses: *Please attach a copy of the child care, annual statement

School / Daycare Name: _____

Address: _____

City, State, Zip: _____

Tax ID / ENT#: _____ Total Paid: _____

***Other Itemized taxable deductions: (please list any applicable expense totals).**

_____ Taxes Paid (Property taxes, sales tax, estimated taxes, other taxes paid, etc.)

_____ Mortgage Interest (Form 1098)

_____ Donations to Charities (Clothing, furniture, miles driven, out-of-pocket expenses, etc.)

_____ Job Expenses (Union dues, job-search expenses, vehicle expenses, miles driven other than commuting, business meals, overnight travel, home office uniforms, business gifts, small tools, parking fees, National Guard)

_____ Self Employed Expenses

_____ Affordable Care Act _____ You/ Your family insurance coverage _____ Form 1095

_____ Total Medical Expenses HSA (Health Savings Account); FSA (Flex Spending Account)
HSA: _____ Taxable HSA Distributions; Annual Medical Premiums
FSA: _____ Unreimbursed Medical Expenses: Copays, Medical/Dental Expenses
Medical premiums: _____ Major illness or surgery expenses (items excluded from HSA or FSA)

_____ College / Teacher Expenses 1098 T; Out of pocket expenses: tuition, books, application fees, student loan interest, etc.

_____ Other Itemized Deductions (Investment expenses, tax preparation fees, etc.)

_____ Casualty and Thefts (Losses from a hurricane, tornado, fire, theft, car accident, etc.)

***Electronic Filing - For Tax Refunds**

_____ Federal and State tax refunds deposited to same account number

_____ Federal deposited, different bank account _____ State deposited, different bank account

_____ Federal and State tax refunds mailed to an address

Bank information:

Bank Name: _____

Routing number: _____

Checking _____

Savings _____

AF&T Services, LLC

E-File or Mail in Tax Preparations

Email: info@afandtservices.com
Web: www.afandtservices.com
Phone: (303) 434-5563

We look forward to completing your E-file or Mail in tax preparations requests!

Our E-file or Mail in tax process is simple, efficient and convenient! Complete all pages of this document, and provide the below information. Please complete this worksheet prior to your appointment; or scan and email **all** documents to: info@afandtservices.com

***Include the following information:**

- Employment documents - W2, 1099, etc.
 Prior year tax documents –**Required for NEW clients** (all documents are returned, upon completion of your taxes)
 You / Your family insurance coverage Form 1095 (all pages required)

***Recap of Itemized tax deduction totals and documents:**

- Taxes Paid Mortgage Interest (Form 1098) College / Teacher Expenses
 Donations to Charities Job Expenses Self Employed Expenses
 Medical Expenses Other Itemized Deductions Casualty and Thefts

E-file or Mail in – Tax Preparation Payments:

*All E-file and or mail in tax preparations – requires your below signature, with required payments processed using **PayPal, or Cash payments**. Upon completion of tax preparation requests, AF&T Services will send an email notification and your itemized tax receipt, with a balance due.

*PayPal payments processing - website www.paypal.com. **Send all tax preparation payments to: AudraWebber@outlook.com** enter the applicable tax preparation fee amount (indicated on emailed tax receipt, or from Thumbtacks requests); **pay by checking account or credit cards**.

Upon receipt of PayPal payment confirmation, AF&T Services will E-file your taxes. For your records, AF&TS will provide all completed Federal and or State taxes tax preparations options include: **email or you can schedule a time to pick up your taxes. Mailed tax preparation requests requires printing, S&H processing fee \$6.00.**

Authorization to Electronically Sign Documents:

I agree to use the below as my electronic signature and provide my permission to AF&T Services, to apply an image of it to any applicable documents throughout my tax requested services. My electronic signature also authorizes – Electronic Filing for my annual tax returns (Federal and or State). I assume all responsibility of documents and information provided to IRS and or Colorado Dept. of State Treasury; including but not limited to all W2 or 1099; expense amounts, names filed for taxes, social security numbers and date of births. I also understand AF&TS is not a PIN Agency, and I am filing my taxes as a self-preparer.

Disclaimer: Alternative Financial & Tax Services is compelled to comply ethically with all pertinent government rules and regulations. The government regulations included and are not limited to the Internal Revenue Services, Colorado Department of State Treasury, and any other federal or state agencies and municipal authorities. The contents of neither this page nor any conversation you have with AF&TS may be construed as legal advice. If you have legal questions, you are encouraged to consult with and/or retain a tax attorney.

Privacy Notice: Protecting your privacy is important at AF & T Services. We recognize that the privacy of personal information is important to our customers, and we strive to operate our business in a manner that justifies your choice of AF&T Service's products and services. We will not share or sell your information without your consent.

Customer Signature: _____

Date: _____



Software: Tax Hawk (IRS Authorized)

Customer Signature: _____

Date: _____

Driver License / ID #: _____

Exp Date: _____

AF&TS ~Tax Preparations & Accountant~ (303) 434-5563

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