

SANZ VIRTUAL ENTERPRISE, LLC ACCOUNTING AND TAXES CPA SERVICES

Taxpayer Interview Worksheet

Taxpaver Names

Select applicable Filing Status: Select applicable Filing Status: Single Married Filing Jointly Head of Household Qualifying Widow(er) Married Filing Number of Dependents to be claimed on tax return Dependents info: Name Date of Birth Relationship Income & Earnings info: W-2s Earnings Amount Taxes Withheld 1099s Earnings Amount Taxes Withheld 1099 #1 W-2 #1 1099 #2 W-2 #2 1099 #3 Deductions & Credits: Expense Amount Cash donations Property taxes Ad-valorem taxes Non-cash donations Ad-valorem taxes Medical expenses State taxes paid Child care expenses Educational expenses Dependent care exp		st and Last Nam	es	Date of Birth		Ema	:1	Dh an a muna	
Select applicable Filing Status: Single Married Filing Jointly Head of Household Qualifying Widow(er) Married Filing Number of Dependents to be claimed on tax return Dependents info: Name Date of Birth Relationship Income & Earnings Info: W-2s Earnings Amount Taxes Withheld 1099 Earnings Amount Taxes Withheld 1099 #1 W-2 #1 1099 #2 W-2 #2 1099 #3 Deductions & Credits: Expense Amount Expense Amount Cash donations Property taxes Ad-valorem taxes State taxes paid Child care expenses State taxes paid Educational expenses Dependent care exp	Address			mes Date of Birth		Ema		Phone numb	
Select applicable Filing Status: Single Married Filing Jointly Head of Household Qualifying Widow(er) Married Filing Number of Dependents to be claimed on tax return Dependents info: Name Date of Birth Relationship Income & Earnings Info: W-2s Earnings Amount Taxes Withheld 1099 Earnings Amount Taxes Withheld 1099 #1 W-2 #1 1099 #2 W-2 #2 1099 #3 Deductions & Credits: Expense Amount Expense Amount Cash donations Property taxes Ad-valorem taxes State taxes paid Child care expenses State taxes paid Educational expenses Dependent care exp	Address								
Select applicable Filing Status: Single Married Filing Jointly Head of Household Qualifying Widow(er) Married Filing Number of Dependents to be claimed on tax return Dependents info: Name Date of Birth Relationship Income & Earnings Info: W-2s Earnings Amount Taxes Withheld 1099 Earnings Amount Taxes Withheld 1099 #1 W-2 #1 1099 #2 W-2 #2 1099 #3 Deductions & Credits: Expense Amount Expense Amount Cash donations Property taxes Ad-valorem taxes State taxes paid Child care expenses State taxes paid Educational expenses Dependent care exp	Address								
Select applicable Filing Status: Single Married Filing Jointly Head of Household Qualifying Widow(er) Married Filing Number of Dependents to be claimed on tax return Dependents info: Name Date of Birth Relationship Income & Earnings Info: W-2s Earnings Amount Taxes Withheld 1099 Earnings Amount Taxes Withheld 1099 #1 W-2 #1 1099 #2 W-2 #2 1099 #3 Deductions & Credits: Expense Amount Expense Amount Cash donations Property taxes Ad-valorem taxes State taxes paid Child care expenses State taxes paid Educational expenses Dependent care exp		s:							
Number of Dependents to be claimed on tax return Dependents info: Name				Calcat and P	-bl- 5::: 6:	-4			
Number of Dependents to be claimed on tax return Dependents info: Name	_	_		Select application	able Filing Sta	atus:		_	
Name Date of Birth Relationship	Single	Married Filing	Jointly	Head of Hous	sehold 🔲 (Qualifyi	ng Widow(er)	Married Filing	
Name Date of Birth Relationship									
Name Date of Birth Relationship	N1e- = =	r of Donordonts	- a b a -	laimand an tau matuur	n				
Name Date of Birth Relationship	ivumbe	r or Dependents 1	to be c						
Income & Earnings info: W-2s Earnings Amount Taxes Withheld 1099s Earnings Amount Taxes Withheld W-2 #1 1099 #1 W-2 #2 1099 #2 W-2 #3 1099 #3 Deductions & Credits: Expense Amount Expense Amount Mortgage interest Cash donations Property taxes Non-cash donations Ad-valorem taxes State taxes paid Child care expenses Educational expenses Dependent care exp						1			
W-2s Earnings Amount Taxes Withheld 1099s Earnings Amount Taxes Withheld W-2 #1 1099 #1 1099 #2 1099 #2 W-2 #3 1099 #3 1099 #3 Deductions & Credits: Expense Amount Expense Amount Mortgage interest Cash donations Property taxes Non-cash donations Ad-valorem taxes Medical expenses State taxes paid Child care expenses Educational expenses Dependent care exp		Name	Date	of Birth		Re	lationship		
W-2s Earnings Amount Taxes Withheld 1099s Earnings Amount Taxes Withheld W-2 #1 1099 #1 1099 #2 1099 #2 W-2 #3 1099 #3 1099 #3 Deductions & Credits: Expense Amount Expense Amount Mortgage interest Cash donations Property taxes Non-cash donations Ad-valorem taxes Medical expenses State taxes paid Child care expenses Educational expenses Dependent care exp									
W-2s Earnings Amount Taxes Withheld 1099s Earnings Amount Taxes Withheld W-2 #1 1099 #1 1099 #2 1099 #2 W-2 #3 1099 #3 1099 #3 Deductions & Credits: Expense Amount Expense Amount Mortgage interest Cash donations Property taxes Non-cash donations Ad-valorem taxes Medical expenses State taxes paid Child care expenses Educational expenses Dependent care exp									
W-2s Earnings Amount Taxes Withheld 1099s Earnings Amount Taxes Withheld W-2 #1 1099 #1 1099 #2 1099 #2 W-2 #3 1099 #3 1099 #3 Deductions & Credits: Expense Amount Expense Amount Mortgage interest Cash donations Property taxes Non-cash donations Ad-valorem taxes Medical expenses State taxes paid Child care expenses Educational expenses Dependent care exp									
W-2s Earnings Amount Taxes Withheld 1099s Earnings Amount Taxes Withheld W-2 #1 1099 #1 1099 #2 1099 #2 W-2 #3 1099 #3 1099 #3 Deductions & Credits: Expense Amount Expense Amount Mortgage interest Cash donations Property taxes Non-cash donations Ad-valorem taxes Medical expenses State taxes paid Child care expenses Educational expenses Dependent care exp									
W-2 #1							T		
W-2 #2 W-2 #3 Deductions & Credits: Expense Amount Expense Amount Mortgage interest Cash donations Property taxes Non-cash donations Ad-valorem taxes Medical expenses State taxes paid Child care expenses Educational expenses Dependent care exp		Earnings Amount		Taxes Withheld		Earni	ngs Amount	Taxes Withheld	
Deductions & Credits: Expense Amount Expense Amount Mortgage interest Cash donations Property taxes Non-cash donations Ad-valorem taxes Medical expenses State taxes paid Child care expenses Educational expenses Dependent care exp									
Deductions & Credits: Expense Amount Expense Amount Mortgage interest Cash donations Property taxes Non-cash donations Ad-valorem taxes Medical expenses State taxes paid Child care expenses Educational expenses Dependent care exp									
ExpenseAmountExpenseAmountMortgage interestCash donationsProperty taxesNon-cash donationsAd-valorem taxesMedical expensesState taxes paidChild care expensesEducational expensesDependent care exp	W-2 #3				1099 #3				
Mortgage interest Property taxes Non-cash donations Ad-valorem taxes Medical expenses State taxes paid Educational expenses Dependent care exp				Deductio	ons & Credits	:			
Property taxes Ad-valorem taxes State taxes paid Educational expenses Dependent care exp	E	xpense		Amount		Expense		Amount	
Ad-valorem taxes State taxes paid Educational expenses Dependent care exp									
State taxes paid Child care expenses Educational expenses Dependent care exp									
Educational expenses Dependent care exp									
	Educati	onal expenses			Depender	nt care	ехр		
Medical miles driven: Charitable activity miles driven:	N 4 = -11 -	landina aleta e			Claration 1	L	dan cardina di t		