If you can dream it You can do it
CD Tax & Financial, LLC
480.354.1040
1810 S. Crismon Rd., Ste. 188
Mesa, Arizona 85209

Client Information & Update Form

Did you file with CD Tax & Financial, LLC last year? [ ] Yes [ ] No - If No, please provide last 3 years tax returns

Primary Taxpayer Information *Returning Clients- No need for SSN or DOB*

First Name	M.I.	Last Name	Date of Birth	Social Security Number
Current Occupation:			Blind or Disabled?	

Spouse's Information

First Name	M.I.	Last Name	Date of Birth	Social Security Number
Current Occupation:			Blind or Disabled?	

Address	City, State, Zip Code	
Home Phone	Cell Phone	Work Phone
Email Address (this is a great form of communication)		

Filing Status [ ] Single [ ] Married Filing Joint [ ] Head of Household [ ] Qualified Widower [ ] Married Filing Separate*

**Spouse's Information will need to be provided for this filing status.*

For 2009 ONLY: [ ] Married (date: _____________) [ ] Divorced (date: _____________) [ ] Spouse Died (date: _____________)

Dependents - Names MUST be listed as they appear on the Social Security Card.

New Clients: Fill out completely. **Returning Clients:** *Just List the names of the dependents you're claiming (ssn not needed).*

Full Name	Social Security Number	Date of Birth	Relationship
Full Name	Social Security Number	Date of Birth	Relationship
Full Name	Social Security Number	Date of Birth	Relationship
Full Name	Social Security Number	Date of Birth	Relationship
Full Name	Social Security Number	Date of Birth	Relationship
Full Name	Social Security Number	Date of Birth	Relationship

Direct Deposit of Refund or Electronic Payment of Balance Due [ ] Yes (see below) [ ] No

Use same bank account information as last year [ ]

If new client, or using new account, please provide check or bank statement with Routing and Account Numbers.

New clients: How did you hear about us?

[ ] Walk-In
[ ] Newspaper
[ ] Yellow Pages
[ ] Website
[ ] Mailer Flyer - Clipper Ad
[ ] Other ___________________________________
[ ] Referral - Who can we thank for your referral? ____

2009 Estimated Tax Payments

Amount Applied from 2008 refund: ____________________________

First Quarter: Federal Amount Paid: ________ Date Paid: ________ State ____ Amount Paid: ________ Date Paid: ________

Second Quarter: Federal Amount Paid: ________ Date Paid: ________ State ____ Amount Paid: ________ Date Paid: ________

Third Quarter: Federal Amount Paid: ________ Date Paid: ________ State ____ Amount Paid: ________ Date Paid: ________

Fourth Quarter: Federal Amount Paid: ________ Date Paid: ________ State ____ Amount Paid: ________ Date Paid: ________

The following items may affect your tax return. Please answer to the best of your knowledge!

1. Are you a retiree, disabled individual, Supplemental Security Income recipient receiving benefits from SSA, Disabled veteran receiving benefits from the US Dept of Veteran Affairs, or Railroad Retirement beneficiary that received a one-time payment of $250 in 2009? [ ] No [ ] Yes [ ] I don't know
2. Did you purchase a new home between 4/8/2008-4/30/2010 (Must close by 6/30/2010) [ ] No [ ] Yes - If yes, provide details.
3. Did you pay property tax for your primary residence, even if you do not itemize? [ ] No [ ] Yes - If yes, provide details.
4. Was any debt on your principal residence reduced or forgiven in 2009? [ ] No [ ] Yes
   If yes, call before your appointment for further instructions!
5. Was any debt on credit cards, personal loans, or any other type of debt reduced or forgiven in 2009? [ ] No [ ] Yes
   If yes, call before your appointment for further instructions!
6. Did you purchase a new car, truck, motorcycle or motor home from 2/17/09 through 12/31/09? [ ] No [ ] Yes
   If Yes, you must provide a copy of the sales invoice or contract.
7. Did you purchase a new hybrid, advanced lean-burn, or plug-in electric vehicle? [ ] No [ ] Yes
   If yes, provide make model and date of purchase, manufacturer certificate, and the sales invoice or contact.
8. Did you make any energy-efficient improvements to your principal residence during the year, such as solar electric property, fuel cells, solar water heating, geothermal heat pump, small wind energy property, storm windows/doors, insulation, water heater or heating and air conditioning unit? [ ] No [ ] Yes - If yes, provide make model and date of purchase, manufacturer certificate, and the sales invoice or contact.
9. Did you (or do you plan to before April 15, 2010) contribute to a traditional IRA or Roth IRA for 2009? [ ] No [ ] Yes
   Self: Traditional IRA $ ___________ Roth IRA $ ___________ Spouse: Traditional IRA $ ___________ Roth IRA $ ___________
10. Did you or your spouse contribute to a Health Savings Account (H.S.A.) in 2009? [ ] No [ ] Yes - If yes, provide details.
11. Did you, your spouse, or any of your dependents attend college in 2009? [ ] No [ ] Yes - If yes, provide details.
12. Did you pay child care costs for a dependent child under the age 13, or cost of caring for a handicapped individual, so you could work, attend school or look for a job? [ ] No [ ] Yes
    If Yes, provide the amounts paid for each dependent and the names, addresses and taxpayer identification numbers of the care providers. Also, how much, if any, was reimbursed by an employer dependent care plan: $____________________
13. Are you a teacher? [ ] No [ ] Yes - If yes, did you incur out-of-pocket classroom costs? Amount $_________________
14. Did you move because of a job change? [ ] No [ ] Yes - Provided details for a possible moving expense deduction.
15. Did you incur any expenses associated with adoption of a child? [ ] No [ ] Yes

Tax Tips for Taxpayers!

We advise keeping copies of all income tax returns for ever! Ask how we can help you reduce the paper you are storing!

Charitable contributions of $250 or more in any one day to any one organization must have written substantiation from the organization, including the bank record, such as a cancelled check.

When making contributions of used furniture, appliances, and clothing to a nonprofit organization, request a receipt from the organization. Attach a record of the items donated to the receipt for proof of this deductible contribution.

Improvement costs may reduce the taxable profit upon sale of the property. Keep records of improvement costs made to all real property after the sale to prove the increase in your basis.