

# BASIC INFORMATION SHEET

IMPORTANT: PLEASE FILL OUT COMPLETELY AND LEGIBLY- THANK YOU

YOUR FULL NAME: \_\_\_\_\_

YOUR ADDRESS: \_\_\_\_\_

YOUR SSN: \_\_\_\_\_ BIRTHDATE: \_\_\_\_\_ PHONE: \_\_\_\_\_

OCCUPATION: \_\_\_\_\_ ADDITIONAL PHONE : \_\_\_\_\_

IF YOU ARE MARRIED, YOUR SPOUSES:

FULL NAME: \_\_\_\_\_ SSN: \_\_\_\_\_

BIRTHDATE: \_\_\_\_\_ OCCUPATION: \_\_\_\_\_

PLEASE CHECK OR CIRCLE YOUR FILING STATUS:

SINGLE \_\_\_ MARRIED FIL JT \_\_\_ MARRIED FIL SEP \_\_\_ HEAD OF HOUSE \_\_\_ WIDOW(ER) \_\_\_

IF YOU ARE CHECKING HEAD OF HOUSE AND HAVE NO DEPENDENTS, WHAT IS THE NAME \_\_\_\_\_, SSN \_\_\_\_\_, RELATIONSHIP \_\_\_\_\_

OF THE PERSON QUALIFYING YOU FOR THAT.

PLEASE LIST YOUR DEPENDENTS AND NON DEPENDENTS YOU ARE CLAIMING:

(PLEASE LIST YOUNGEST FIRST)

FIRST NAME	LAST NAME (IF DIFFERENT)	BIRTHDATE	SSN	RELATIONSHIP
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

IF YOU ARE CLAIMING AS A DEPENDENT A CHILD WHO DID NOT LIVE IN YOUR MAIN HOUSEHOLD, CHECK THE DOCUMENTS THAT SUBSTANTIATE THIS CLAIM: A DIVORCE OR SEPARATION AGREEMENT WITHOUT CONDITIONS \_\_\_\_\_, OR A SIGNED FORM 8332 \_\_\_\_\_. (FORM 8332 MUST BE MAILED IN WITH YOUR TAX RETURN).

DID YOU PAY ANY CHILD OR DEPENDENT CARE EXPENSES FOR ANY DEPENDENT LISTED ABOVE ( PLEASE DO NOT COUNT AMOUNTS YOU WERE RE-IMBURSED FOR ). PLEASE LIST:

NAME OF DEPENDENT	AMOUNT PAID	NAME-ADDRESS-AND THE EIN NUMBER OF COMPANY (OR?)PAID TO
_____	_____	_____

PLEASE ANSWER THESE QUESTIONS: THESE QUESTIONS SHOULD BE FILLED OUT FOR EACH YEAR YOU ARE FILING A RETURN FOR (ONLY IF INFO VARIES FROM YEAR TO YEAR). LIST THE TAX YEAR(S) THIS INFO IS FOR \_\_\_\_\_

1) DO YOU WANT \$3.00 TO GO TO THE PRESIDENTIAL ELECTIONS?? YES \_\_\_ OR NO \_\_\_

2) IF YOU HAD CIVILIAN JOBS IN DIFFERENT STATES, AND HAD WITHHOLDING FROM YOUR PAY THAT YOU NEED TO FILE A RETURN FOR TO GET A REFUND PLEASE LIST HERE:

STATE	DATE ARRIVED IN STATE	DATE YOU LEFT THAT STATE
_____	_____	_____

3) IF YOU HAD UN-REIMBURSED MOVING EXPENSES BECAUSE YOU HAD A PERMANENT CHANGE OF STATION WHILE ON ACTIVE DUTY OR WITHIN ONE YEAR AFTER ACTIVE DUTY ENDED, PLEASE LIST HERE:

TOTAL	(MINUS)	AMOUNT RE-IMBURSED(IF ANY)
_____	_____	_____

4) IF YOU WANT ME TO CHECK IF COUNTING YOUR OTHERWISE NON-TAXABLE COMBAT PAY WILL INCREASE YOUR REFUND, CHECK HERE \_\_\_\_\_.



## OTHER IMPORTANT INFORMATION:

- A) WHATEVER ADDRESS YOU PUT ON YOUR TAX RETURN WILL BECOME YOUR RECORD OF ADDRESS TO THE IRS, AND WILL BE WHERE THEY WILL MAIL ANY REFUNDS TO YOU. YOU CAN USE WHATEVER ADDRESS YOU WANT TO USE, YOUR HOME ADDRESS, YOUR MILITARY ADDRESS OR WHATEVER.
- B) YOU SHOULD ALLOW 6 TO 12 WEEKS OR SO AFTER THE IRS RECEIVES YOUR RETURN TO LOOK FOR YOUR REFUND. IF AFTER 6 WEEKS YOU HAVE NOT RECEIVED YOUR REFUND YOU CAN CALL THEM AT THE NUMBERS ON THE GETTING STARTED PAGE. IF YOUR RETURN IS A CURRENT YEAR RETURN YOU CAN GO TO [irs.gov](http://irs.gov) TO LOOK IT UP.
- C) IF YOU HAVE ALLREADY FILED A RETURN FOR 2004, 2005, OR 2006 AND SEE SOMETHING THAT MAY NOT HAVE BEEN DONE RIGHT, AND IT COULD BE CORRECTED GIVING YOU A HIGHER REFUND, I CAN FILE AN AMENDED RETURN FOR YOU. I WILL NEED AN ACTUAL COPY OF YOUR RETURN THAT WAS ORIGINALLY FILED, AND THE INFORMATION CAUSING THE CHANGE. I CHARGE \$50.00 TO DO AN AMENDED RETURN.
- D) IT IS RECOMMENDED FOR YOU TO ALWAYS USE YOUR ACTUAL W-2'S AND OTHER INCOME STATEMENTS AS ORIGINALLY MAILED TO YOU. THEY HAVE IMPORTANT INFORMATION IN THEM THAT THE RECORDS YOU GET FROM THE IRS WILL NOT HAVE, LIKE STATE WITHHOLDING INFO, ETC.
- E) IF YOU DID NOT HAVE ANY WITHHOLDING FROM YOUR PAYCHECK FOR THE YEAR FOR ANY STATE, THERE MAY NOT BE A REFUND FROM THAT STATE, AND WHETHER YOU FILE A RETURN TO THAT STATE IS UP TO YOU. IN MOST CASES THE STATE'S ARE OF SECONDARY IMPORTANCE WITH RESPECT TO ANY REFUNDS.
- F) PLEASE DO NOT SEND ME ANY OF YOUR RECEIPTS, SAVE THESE FOR THE IRS IF THEY EVER CALL YOU AND WANT TO SEE THEM. IF I DO YOUR RETURN IT IS AGREED UPON BY BOTH YOU AND ME THAT YOU HAVE GIVEN ME ALL THE PERTINENT INFORMATION TO PROPERLY DO YOUR TAX RETURN. THERE IS NO WAY I CAN KNOW YOUR RELEVANT INFORMATION, YOU HAVE TO PROVIDE IT TO ME. I CAN ONLY DO A TAX RETURN BASED ON THE INFORMATION YOU PROVIDE.  
PLEASE SIGN/INITIAL HERE TO ACKNOWLEDGE THIS \_\_\_\_\_
- G) PLEASE SEE THE NEXT PAGE (PAGE 4) FOR INFORMATION ON MY FEES.
- H) PLEASE USE THE SAME "HOME" ADDRESS REGARDLESS OF THE TAX YEAR YOU ARE DOING.

# FEE STRUCTURE

1. IF YOUR FILING STATUS IS SINGLE WITH NO DEPENDENTS, CHECK HERE \_\_\_\_\_  
AND ENCLOSE A MONEY ORDER FOR \$75.00 (FOR EACH YEAR) MADE OUT TO ERNIE G.
2. IF YOUR FILING STATUS IS HEAD OF HOUSEHOLD WITH DEPENDENTS YOU LISTED ON  
PAGE 1 OF THE BASIC INFORMATION SHEET, CHECK HERE \_\_\_\_\_  
AND ENCLOSE A MONEY ORDER FOR \$100.00 (FOR EACH YEAR) MADE OUT TO ERNIE G.
3. IF YOUR FILING STATUS IS MARRIED FILING JOINTLY, CHECK HERE \_\_\_\_\_  
AND ENCLOSE A MONEY ORDER FOR \$100.00 (FOR EACH YEAR) MADE OUT TO ERNIE G.
4. IF YOUR FILING STATUS IS MARRIED FILING SEPARATE AND YOU ARE FROM A  
COMMUNITY PROPERTY STATE ( CA, AZ, NV, ID, NM, TX, WA, LA, WI, ) YOU MIGHT WANT  
TO GET YOUR RETURN DONE FROM SOMEONE WITH EASIER ACCESS. ONLY BECAUSE  
OF THE DETAILED INFORMATION REQUIRED. IF YOU ARE NOT FROM A COMMUNITY  
STATE, I CAN DO IT FOR YOU. PLEASE CHECK HERE \_\_\_\_\_  
AND ENCLOSE A MONEY ORDER FOR \$100.00.
5. QUALIFYING WIDOW(ER) WITH DEPENDENT CHILD. YEAR SPOUSE DIED \_\_\_\_\_  
PLEASE ENCLOSE A MONEY ORDER FOR \$100.00.

PLEASE MAIL ALL OF YOUR W-2'S, AND ALL OTHER NECESSARY INFORMATION  
AND THE BASIC INFO SHEET, ALONG WITH A MONEY ORDER FOR THE CORRECT  
AMOUNT TO;

ERNIE GALLARDO  
HC 67 BOX 922  
KIRKLAND, AZ 86332-9617

E-MAIL TO

[ERNIE@MILITARYINCOMETAXSERVICE.COM](mailto:ERNIE@MILITARYINCOMETAXSERVICE.COM)