



2016 QUOTE REQUEST

Name: _____

Email: _____ Tel. _____

Filing Status:

Single **Married Filing Jointly** **Married Filing Separately** **Head of Household**

of Dependents you are claiming on tax return: _____

✓

<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 100px;">W-2 # of forms _____</td></tr> <tr><td>Interest</td></tr> <tr><td>Dividends</td></tr> <tr><td>Sale of stock/securities</td></tr> <tr><td>Pension / Annuities</td></tr> <tr><td>Unemployment</td></tr> <tr><td>Social Security</td></tr> <tr><td>Alimony</td></tr> <tr><td>IRA / 401k withdrawal (Form 1099-R)</td></tr> <tr><td>IRA rollover</td></tr> <tr><td>All family members have health insurance</td></tr> <tr><td>Self-Employment Income</td></tr> <tr><td>Rental/Investment Properties: # _____</td></tr> <tr><td>Office in the Home</td></tr> <tr><td>Moving Expenses</td></tr> <tr><td>Childcare Expenses</td></tr> <tr><td>Education Expenses</td></tr> <tr><td>Mortgage Interest/Real Estate Taxes</td></tr> <tr><td>Employee Business Expenses</td></tr> <tr><td>Household Employee (nanny, etc.)</td></tr> <tr><td>K-1 – Partnership / S Corp / Estate</td></tr> <tr><td>States to file: <input type="checkbox"/> NY <input type="checkbox"/> NJ <input type="checkbox"/> ___ <input type="checkbox"/> ___</td></tr> <tr><td>Charitable Donations <input type="checkbox"/> clothing /household</td></tr> <tr><td>Nonresident Alien/Visa Holder</td></tr> <tr><td>Foreign Earned Income</td></tr> <tr><td>Foreign Bank Account / Pension / Securities</td></tr> <tr><td>Calculations for 2016's estimated taxes</td></tr> <tr><td>Other issues <i>(please describe on next page)</i></td></tr> </table>	W-2 # of forms _____	Interest	Dividends	Sale of stock/securities	Pension / Annuities	Unemployment	Social Security	Alimony	IRA / 401k withdrawal (Form 1099-R)	IRA rollover	All family members have health insurance	Self-Employment Income	Rental/Investment Properties: # _____	Office in the Home	Moving Expenses	Childcare Expenses	Education Expenses	Mortgage Interest/Real Estate Taxes	Employee Business Expenses	Household Employee (nanny, etc.)	K-1 – Partnership / S Corp / Estate	States to file: <input type="checkbox"/> NY <input type="checkbox"/> NJ <input type="checkbox"/> ___ <input type="checkbox"/> ___	Charitable Donations <input type="checkbox"/> clothing /household	Nonresident Alien/Visa Holder	Foreign Earned Income	Foreign Bank Account / Pension / Securities	Calculations for 2016's estimated taxes	Other issues <i>(please describe on next page)</i>	<p>Self-Employment:</p> <p># of businesses: _____</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No Are you an LLC?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No Office in Home</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No Vehicle Expenses</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No Profit/Loss Stmt available</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No Business has inventory</p> <p>NOTE: We are happy to provide an estimate, based on required reporting to the Taxing Authorities. There may be additional items to report that you have not noted on this request. Therefore, our fees are NOT complete until your return is complete and has its final review. Our fees are based on the complexity of your return.</p> <p><u>Send your quote request for a prompt reply via:</u></p> <p>Email: info@choice-tax.com</p> <p>Fax: (347) 438-3113 or (347) 704-0027</p> <p>Phone: (347) 598-0111</p> <p style="text-align: center;">Minimum tax return fee: \$295</p> <p style="text-align: center;">We offer both in-person and e-appointments.</p> <p style="text-align: center;">Did you know that we also offer other helpful services?</p> <ul style="list-style-type: none"> ✓ Audit Representation ✓ IRS & State Installment Payment Agreements ✓ Tax Planning – Individual & Small Business ✓ Retirement Planning ✓ Credit Card Counseling ✓ Entity Formation – LLC, Corporations (C & S)
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Additional Questions/Issues/Information:

Did you know that we also offer other helpful services?

- ✓ **Tax Planning**
- ✓ **Retirement Planning**
- ✓ **Audit Representation**
- ✓ **IRS and State Installment Payment Agreements**
- ✓ **Credit Card/Debt Counseling**
- ✓ **Entity Formation – LLC, C Corporation, S Corporation**
- ✓ **Small Business Planning**