

## Jordan And Jordan

### Tax Information Sheet

Enter The Amounts For All Stimulus Money You Received IN 2020 In the Box Below

#### Primary Taxpayer Information

First Name    Last Name    DOB    SSN/ITIN

Occupation

Referred By

Name & Email:

Current Address:

City:

State:

Zip Code

#### Spouse Information

First Name    Last Name    DOB    SSN/ITIN

**Refund Direct Deposit Information**

Bank Name:	<input type="text"/>
Bank Routing:	<input type="text"/>
Bank Account Number:	<input type="text"/>

**Dependent 1**

First Name	Last Name	DOB	SSN/ITIN
<input type="text"/>			

**Dependent 2**

First Name	Last Name	DOB	SSN/ITIN
<input type="text"/>			

**Dependent 3**

First Name	Last Name	DOB	SSN/ITIN
<input type="text"/>			

**Dependent 4**

First Name	Last Name	DOB	SSN/ITIN
<input type="text"/>			

Dependent Child Care

Organization Name:

Address:

City

State

Zip

Tax ID Number of Organization:

Amount paid to Organization:

Who was the care for (Names)

Educational & Professional Expenses

Investments, Stock Trade Transactions:

**NOTE:** All of the Brokerage Account 1099-DIV and year end statements Must be Provided

Medical And Dental Expenses

Real Estate Taxes

Mortgage Interest Paid /

Foreign Property Mortgage Interest Paid:

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Origination Fees

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Home Owners Insurance Costs:

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Charitable Contributions:

& Non Cash Items

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Upload this form to the shared area that was setup for you

Thank you for becoming a client with us Jordan And

Jordan When the Returns are completed, we will notify

you by email