



200 BROADHOLLOW ROAD, #207
MELVILLE, NY 11747

65 BROADWAY, 7TH FLOOR
NEW YORK, NY 10006

PHONE 347.598.0111 FAX 347.438.3113
WWW.CHOICE-TAX.COM

2015 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: 10%;">W-2</td><td style="width: 40%;"># of forms _____</td></tr> <tr><td>Interest</td><td></td></tr> <tr><td>Dividends</td><td></td></tr> <tr><td>Sale of stock/securities</td><td></td></tr> <tr><td>Pension / Annuities</td><td></td></tr> <tr><td>Unemployment</td><td></td></tr> <tr><td>Social Security</td><td></td></tr> <tr><td>Alimony</td><td></td></tr> <tr><td>IRA / 401k withdrawal (Form 1099-R)</td><td></td></tr> <tr><td>IRA rollover</td><td></td></tr> <tr><td>All family members have health insurance</td><td></td></tr> <tr><td>Self-Employment Income</td><td></td></tr> <tr><td>Rental/Investment Properties: # _____</td><td></td></tr> <tr><td>Office in the Home</td><td></td></tr> <tr><td>Moving Expenses</td><td></td></tr> <tr><td>Childcare Expenses</td><td></td></tr> <tr><td>Education Expenses</td><td></td></tr> <tr><td>Mortgage Interest/Real Estate Taxes</td><td></td></tr> <tr><td>Employee Business Expenses</td><td></td></tr> <tr><td>Household Employee (nanny, etc.)</td><td></td></tr> <tr><td>K-1 – Partnership / S Corp / Estate</td><td></td></tr> <tr><td>States to file: <input type="checkbox"/> NY <input type="checkbox"/> NJ <input type="checkbox"/> ___ <input type="checkbox"/> ___</td><td></td></tr> <tr><td>Charitable Donations <input type="checkbox"/> clothing /household</td><td></td></tr> <tr><td>Nonresident Alien/Visa Holder</td><td></td></tr> <tr><td>Foreign Earned Income</td><td></td></tr> <tr><td>Foreign Bank Account / Pension / Securities</td><td></td></tr> <tr><td>Calculations for 2016's estimated taxes</td><td></td></tr> <tr><td>Other issues <i>(please describe on next page)</i></td><td></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>Minimum tax return fee: \$250</p> <p>We offer both in-person and e-appointments.</p> <p>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**
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- ✓ **IRS and State Installment Payment Agreements**
- ✓ **Credit Card/Debt Counseling**
- ✓ **Entity Formation – LLC, C Corporation, S Corporation**
- ✓ **Small Business Planning**