

Name: Taxpayer, Last Name _____ First Name & Initial _____
Spouse, Last Name _____ First Name & Initial _____

Social Security Number: Taxpayer _____ - _____ - _____ Date of Birth: Taxpayer _____

Social Security Number: Spouse _____ - _____ - _____ Date of Birth: Spouse _____

Is address different from last year's return? If yes, attach old address.

Address: _____ E-Mail Address _____ Tel:Home (_____) _____
Tel:Work (_____) _____

Filing Status: [] Single [] Married Filing Joint [] Surviving Widow/Widower
Check one: [] Married Filing Separately (enter spouse's name & SS # above) [] Unmarried Head of Household

Table with 5 columns: Name, Date of Birth, Social Security Number, Relationship, No. of Months lived in your home. Header: DEPENDENTS

Exemptions: Taxpayer: [] Self [] 65 or over [] Blind/Disabled Spouse: [] Self [] 65 or over [] Blind/Disabled
Taxpayer: Can your parents (or someone else) claim you as a dependent on their return? Y [] N [] Spouse? Y [] N []

Checklist: This list will help in the accurate preparation of your return. Please answer and provide supporting information

- YES NO
Did you receive any employer-provided educational assistance in 2004? \$ _____
Did you incur any educational expenses on behalf of yourself, your spouse, or a dependent in 2004?
Did you contribute to a Qualified State Tuition Plan in 2004?
If you are an educator, did you have unreimbursed work-related expenses in 2004? Amount: \$ _____
Do you or your spouse have any kind of pension, 401k, retirement plan, or IRA?
If yes, were you or your spouse at least 70 1/2 years of age on Dec.31st?
Did you withdraw IRA or Keogh funds during the year?
Did you sell stocks, mutual funds, or bonds in 2004?
Did you, or your spouse, receive social security benefits in 2004? Attach social security benefits statements
Did you pay alimony? If Yes, paid to: _____ SS# _____ \$ _____
Did you have any adoption expenses in 2004?
Did you pay day care expenses for a dependent in 2004?
Did you receive gifts in excess of \$10,000 from a foreign person in 2004?
Did your college student receive educational benefits under a prepaid tuition program?
Do you wish to designate \$3 of your taxes to the Presidential Campaign Fund?
Did you receive an advance rebate in 2004? If yes, how much? \$ _____
Have you ever qualified for the Earned Income Tax Credit?
Did you make estimated federal tax payments for year 2004? Did you make Calif estimated payments Y_N_
Did you apply your 2003 refund to your 2004 estimated tax payments? California? Y_N_
For year 2003 did you itemize your deductions and receive a California refund? If yes, enter CA refund:\$ _____
Did you have a casualty or theft loss? If so, attach itemized list.

Income Attach to this fax copies of all 2004 W-2s Number of W-2s attached? _____
Taxable interest income \$ _____ Unemployment benefits received \$ _____

Electronic Filing: File federal return by e-file? Y ___ N ___ File California return by e-file? Y ___ N ___

Refund: Yes ___ I would like to have my refund deposited directly to my bank account. No ___
If yes, attach a VOID check from the checking account you wish to have the refund deposited to.

Payment of Preparation Fee:
Please charge my VISA __, MasterCard __, for preparation fee: 1040EZ & 540EZ with e-file \$34 1040A & 540A with e-file \$55
Name on card: _____ Card No. _____
Signature: _____ Exp date _____

Sign Here Under penalties of perjury, I declare that I am the person listed above, and the information contained on this form, and or attached to it, to the best of my knowledge, to be correct and accurate. Further, I will not hold Sequoia Business Services, Incorporated, responsible for any inaccuracies contained within.

>>>>>

Signature

Date