Complete form and mail or fax to: Blue Leaf Financial Services, 264 S. La Cienega Blvd. #1039, Beverly Hills, CA 90211
Fax: (323) 857-1907 / Tel: (323) 939-0083

2008

Personal Data

Taxpayer Name			SSN	
Spouse's Name			SSN	
Address			Apt no.	
Address				
City		State	ZIP	
County		School District		
Taxpayer phone Daytime:	Ext:	Evening:	Ext:	Cell:
Spouse phone Daytime:	Ext:	Evening:	Ext:	Cell:
Taxpayer email		Spouse email		
Taxpayer occupation		Spouse occupation		

Taxpayer Date of Birth	☐ Blind	☐ Active military	Do you want $3 to go to the Presidential Election Campaign Fund? ☐
Spouse's Date of Birth	☐ Blind	☐ Active military	Does your spouse want $3 to go to the Presidential Election Campaign Fund? ☐

Date and time of this year's appointment — Economic Stimulus Payment Amount

Your Dependents

Dependent # 1		Dependent # 2		Dependent # 3	
First name / M.I.		First name / M.I.		First name / M.I.	
Last name / Suffix		Last name / Suffix		Last name / Suffix	
SSN/ITIN		SSN/ITIN		SSN/ITIN	
Relationship		Relationship		Relationship	
No. of months lived with you		No. of months lived with you		No. of months lived with you	
Age/DOB		Age/DOB		Age/DOB	
Qualifying child care expenses incurred and paid in 2008		Qualifying child care expenses incurred and paid in 2008		Qualifying child care expenses incurred and paid in 2008	
Portion of qualifying expenses provided by your employer		Portion of qualifying expenses provided by your employer		Portion of qualifying expenses provided by your employer	
Hope Credit qualified expenses paid		Hope Credit qualified expenses paid		Hope Credit qualified expenses paid	
Lifetime Learning Credit qualified expenses paid		Lifetime Learning Credit qualified expenses paid		Lifetime Learning Credit qualified expenses paid	
Tuition and Fees Deduction		Tuition and Fees Deduction		Tuition and Fees Deduction	
Minor child with income over $850? ☐		Minor child with income over $850? ☐		Minor child with income over $850? ☐	

Income Taxes Paid

	Federal			State			Local		
2008 Estimates:	Amount paid	Date paid	Check no.	Amount paid	Date paid	Check no.	Amount paid	Date paid	Check no.
April 15, 2008									
June 16, 2008									
Sept. 15, 2008									
Jan. 15, 2009									
2007 overpayment applied									
2007 Balance due									
2007 Refund									
Additional payments made									
Additional payments made									
Additional payments made									