

KKC	1040	US	Client Information	1
Resident Status	Resident state as of 12/31 (last year) (2)			Filing Status 1 = Single 2 = Married filing joint 3 = Married filing separate 4 = Head of household 5 = Qualifying widow(er) Daytime Phone 1 = Work 2 = Home Dependent Status 1 = Not applicable 2 = Taxpayer could be a dependent 3 = Taxpayer claimed as a dependent
	1=full year resident (1)			
	1=multi-state return (1)			
	State return(s) (i.e. CA, NY, etc.)			
Electronic return(s) (i.e. US, CA, NY, etc.)				
Filing Status	Filing status (see table) (1)			
	1=MFJ versus MFS comparison (1)			
	1=married filing separate and lived with spouse (1)			
	1=married filing separate and must itemize deductions (1)			
	Year spouse died, if qualifying widow(er) (in last two years) (4)			
Taxpayer	First name and initial (20)			
	Last name (20)			
	Title/suffix (5)			
	Social security no. (11)			
	Occupation (25)			
	Date of birth (m/d/y) (8)			
	Date of death (m/d/y) (8)			
	Dependency status (table) (1)			
	1=blind (1)			
Spouse	First name and initial (20)			
	Last name (20)			
	Title/suffix (5)			
	Social security no. (11)			
	Occupation (25)			
	Date of birth (m/d/y) (8)			
	Date of death (m/d/y) (8)			
	1=blind (1)			
Address	1=use foreign format (1)			
	In care of (40)			
	Street address (40)			
	Apartment number (10)			
	City (22)			
	State (2)			
	ZIP code (10)			
Foreign Address	Region (20)			
	Postal code (15)			
	Country (20)			
Taxpayer Contact Information	Home phone (14)			
	Work phone (14)			
	Work extension (5)			
	Daytime phone (table) (1)			
	Mobile phone (14)			
	Pager number (25)			
	Fax number (14)			
	E-mail address (40)			
Spouse Contact Information	Home phone (14)			
	Work phone (14)			
	Work extension (5)			
	Daytime phone (table) (1)			
	Mobile phone (14)			
	Pager number (25)			
	Fax number (14)			
	E-mail address (40)			
				1

KKC	1040	US	Client Information (continued)		1 p2
Miscellaneous	Salutation [O]	(40)		Prepared By 1 = Firm 2 = Non-paid preparer 3 = Self-prepared	
	Custom filter	(20)			
	Firm number	(2)			
	Preparer number	(2)			
	Designee no., if different	(2)			
	Staff preparer number	(2)			
	Prepared by (see table)	(1)			
	Database report state	(2)			
	Promise date	(8)			
	Priority	(6)			
	Primary contact	(40)			

KKC	1040	US	Dependents				2
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DEPENDENTS		# 1	# 2	# 3
First name (20)				
Last name (20)				
Title/suffix (5)				
Date of birth (m/d/y) (8)				
Date of death (m/d/y) (8)				
Social security number (11)				
Relationship (Table 1 or describe) (13)				
Months lived at home (2)				
Type of dependent (Table 2) (1)				
Earned income credit (Table 3) (1)				
Child tax credit (Table 4) (1)				
1=added for Form 1040X (1)				
Claimed by: 1=taxpayer, 2=spouse (1)				
1=dependent exemption not claimed each year (1)				
Exemption (Table 5) (1)				

DEPENDENTS		# 4	# 5	# 6
First name (20)				
Last name (20)				
Title/suffix (5)				
Date of birth (m/d/y) (8)				
Date of death (m/d/y) (8)				
Social security number (11)				
Relationship (Table 1 or describe) (13)				
Months lived at home (2)				
Type of dependent (Table 2) (1)				
Earned income credit (Table 3) (1)				
Child tax credit (Table 4) (1)				
1=added for Form 1040X (1)				
Claimed by: 1=taxpayer, 2=spouse (1)				
1=dependent exemption not claimed each year (1)				
Exemption (Table 5) (1)				

1 Relationship Adopted child Nephew Aunt Niece Brother None Child Other Daughter Parent Father Sister Foster child Son Grandchild Stepchild Grandparent Uncle Mother	2 Type of Dependent 1=Child at living w/ taxpayer (default) 2=Child not living w/ taxpayer 3=Dependent other than child 4=HH only, not a dependent 5=EIC only, not a dependent	3 Earned Income Credit 1=When applicable (default) 2=Student age 19 to 23 3=Disabled age 19 or older 4=Force 5=Suppress	4 Child Tax Credit 1=When applicable (default) 2=Force 3=Suppress	5 Exemption 1=Claim this year 2=Suppress this year 3=Claim in odd years 4=Claim in even years
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KKC	1040	US	Tel. Tax Refund / Misc. Info. / Direct Deposit										3.1
REFUND OF FEDERAL TELEPHONE EXCISE TAX													1 Basis/Loss Limit Schedules 1 = S-corp losses with tax return 2 = with tax return 3 = with worksheets 4 = suppress
Telephone tax refund: 1=force, 2=suppress [O] 54 TS ST Src													
MISCELLANEOUS													2 ES Electronic Payment Date 1 = April 17, 2007 2 = June 15, 2007 3 = September 17, 2007
Presidential campaign: 1=self, 2=spouse, 3=both, 4=neither, 5=blank [O] 1													
Designee/ IRS Discussion	Allow discussion: 1=yes, 2=no, 3=blank [O] 17											(28)	
	Designee's name [O] 61												
	Designee's phone number [O] 62												(14)
	Designee's PIN (5 digit numeric) [O] 63												
1040 label: 1=IRS format, 2=standard (address chg) [O] 2													3 Client Organizer Type 1 = Complete paper organizer 2 = Condensed paper organizer 3 = Partial paper organizer 4 = Blank paper organizer 5 = complete e-Organizer 6 = Partial e-Organizer
Text style: 1=mixed case, 2=upper case [O] 3													
Daytime phone: 1=print, 2=print (suppress when opt.), 3=suppress [O] 26													
Tax filing envelope: 1=6 x 9, 2=9 1/2 x 11 1/2 [O] 27													
Form 1040A: 1=when applicable, 2=suppress [O] 4													
Form 1040EZ: 1=when applicable, 2=suppress [O] 5													
Form 1040NR-EZ: 1=when applicable, 2=suppress [O] 25													
Form 1040-V: 1=when applicable, 2=suppress [O] 6													
Form 1040 payment (defaults to amount due) [O] 7													
Wage schedule: 1=with tax return, 2=with worksheets, 3=suppress [O] 8													
Basis schedule (table 1) 64													
Schedule of loss limitations (table 1) 65													
Effective tax rate: 1=when applicable, 2=suppress [O] 33													
1=debtor in Chapter 11 bankruptcy case filed after October 16, 2005 70													
1=MFS spouse exemption 10													
1=suppress spouse exemption on MFJ return 12													
HOH Spouse Exemption	First name of spouse 56											(20)	
	Last name of spouse 57												
	Social security number 58												(11)
1=preparer has confirmed that the IRS can now process extender impacted returns 74													
1=converted client (proforma use only) 14													
ORGANIZER MISCELLANEOUS													
1=suppress next year's client organizer 13													
Client organizer type (table 3) 387													
Tax return appointment date (m/d/y) [O] 1064													
Tax return appointment time [O] 1065													(10)
Tax return appointment location [O] 1066													
										Hash Total <small>(do not include date amounts)</small>		3.1	