Converted Items – 1040 Individual: TaxAct to ProSeries

Client Information

Taxpayer Last Name
Taxpayer First Name and
Taxpayer Initial
Taxpayer Social Security Number
Taxpayer Occupation
Taxpayer Date of Birth
Taxpayer Date of Death
Taxpayer is Blind
Taxpayer Home Phone
Spouse Last Name
Spouse First Name
Spouse Initial
Spouse Social Security Number
Spouse Occupation
Spouse Date of Birth
Spouse Date of Death
Spouse is Blind
Street Address
Apartment Number
City
State
ZIP Code
Filing Status

Dependent Information

First Name
Last Name
Social Security Number
Relationship
Age or Date of Birth
Months Lived at Home

Direct Deposit/EF

Financial Institution: RTN number
Financial Institution: Account number
Financial Institution: Savings or Checking