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