New Client Checklist

Please bring all the pertinent documents to your first appointment

Tax Clients

☐ Client Information Form

☐ Previous 3 Personal Tax Returns with all supporting documents

☐ Previous 3 Business Tax Return with all supporting documents, *if applicable,* (Form(s) 990, 1065, 1120S, 1120)

☐ Most recent paystub(s)

Business/Bookkeeping Clients

☐ QuickBooks Backup/Portable Backup/Accountants Copy

☐ QuickBooks Online Username and Password (if applicable)

☐ QuickBooks username and password (case sensitive)

☐ Florida Reemployment Account number (if applicable)

☐ Florida Business Partner number

☐ Copy of CP575 – FEIN

☐ Sales Tax Certificate Number (if applicable)

☐ EFTPS username and password

☐ Sales and Use Tax online username and password

☐ Florida Reemployment online username and password

☐ Current year payroll and sales tax returns (Form 941, RT6, DR-15)

☐ Bank Statements

IRS/FDOR Representation Client*

☐ **ALL** IRS/FDPR correspondence

☐ **ALL** documents pertaining to IRS/FDOR issues

*In order for us to represent you in front of the IRS and FDOR, we will have you fill out the applicable Power of Attorney forms at your appointment