

DELAROSA

MULTI-SERVICES INC.

New Client Required Documents

- **ID/DRIVERS LICENSE** (SCANNED COPIES FRONT AND BACK)
- **SOCIAL SECURITY CARD** (SCANNED COPIES FRONT AND BACK)
- **ALL INCOME DOCUMENTS** i.e. ~ W2, 1099-NES, 1099-G (UNEMPLOYMENT FORM), 1099-R (401K WITHDRAWAL FORM), YEARLY CAPITAL GAINS STATEMENTS
- **IF FILING WITH DEPENDENTS** i.e. ~ (COPIES OF SOCIAL SECURITY CARD (FRONT AND BACK), BIRTH CERTIFICATES (SCANNED COPY), PROOF OF RELATIONSHIP, AND DOCTORS OR SCHOOL LETTER WITH DEPENDENTS NAME AND FILERS ADDRESS ON PROFESSIONAL SIGNED LETTERHEAD
- **IF MARRIED FILING JOINT** i.e. ~ COPY OF MARRIAGE CERTIFICATE AND ALL REQUIRED IDENTIFICATION COPIES AS PRIMARY FILER (REFER TO LINE 1 AND 2)
- **IF SELF EMPLOYED** i.e. ~ ALL BANK YEARLY STATEMENT REFLECTING REPORTED INCOME, ALL EXPENSES W/ RECEIPTS REFLECTING ALL EXPENSES
- **IF STUDENT** i.e. ~ FORMS 1098-T, 1098-E FORMS WOULD BE REQUIRED TO FILE FOR THE STUDENT TUITION CREDIT (NOTE: TO ASK IF STUDENT IS AN UNDERGRAD)
- **IF HOMEOWNER** i.e. ~ 1098-MORTGAGE FORM AND STATE TAX PAID FOR THE YEAR AND INSURANCE PAID FOR THE YEAR
- **IF HOMEOWNER HAVE RENTAL** i.e. ~ 1099-MISC RENT INCOME FORM IS NEEDED AND ALL HOME REPAIRS AND UTILITY EXPENSES AND HOME IMPROVEMENTS CAN BE REPORTED WITH PROOF ATTACHED i.e. (RECEIPTS AND ALL INVOICES FOR THE FILING YEAR)
- **FOR DIRECT DEPOSIT** i.e. ~ VOID CHECK OR BACK COPY OF DIRECT DEPOSIT BANK ACCOUNT NUMBERS AND ROUTING NUMBERS ARE REQUIRED (CAN NOT BE WORD OF MOUTH OR WRITTEN IN ANY FORM!)

More information :



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