L & L Tax Group Inc

Tax Client Information Sheet

Are you new? Yes/no, if so who referred you____________

Name:____________________ Social: _______________ DoB: _____________

Occupation: ________________________ Driver's License #______________

Phone: ________________________ Cell Phone: ____________________

Email Address: ____

Spouse Name: ________________Social: ______________ DoB: ___________

Occupation: ________________________ Driver's License #_______________

Phone: ________________________ Cell Phone: ____________________

Email Address: ____

Address: ____

City, State, Zip: ____

Dependents

Name	Social	Relationship	Birthdate

If Dropping off, We will need Bank information

for staff use only

Temperature____
Date __________

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Here's what you'll need to bring with you to your tax appointment: 2020

Appointment Date: _________________ Appointment Time: _________________

- ☐ Proof of identification (Drivers License, Government issued Photo I.D.).
- ☐ Social Security Cards for you, your spouse and dependents and/or a Social Security Number verification letter issued by the Social Security Administration. If you or your dependent is not eligible to get a Social Security Number, you may need to obtain an Individual Taxpayer Identification Number (ITIN). We can help you do this.
- ☐ Birth dates for you, your spouse and any dependents on the tax return.
- ☐ Wage and earning statement(s) Form W-2, W-2G, and 1099-R, from all employers and payers. If you have not received your Forms W-2 from your employer and want to know what to do, we can help. Call us.
- ☐ Self-employed business income and expenses - Forms 1099-MISC and 1099K.
- ☐ Records of job-related educational expenses and un-reimbursed employment related expenses.
- ☐ Interest and dividend statements - Forms 1099-INT and 1099-DIV.
- ☐ Social Security, State Income Tax refund and Unemployment Compensation statements - Forms SSA-1099 and 1099-G.
- ☐ Information on Broker and Barter Exchange Transactions - Form 1099-B.
- ☐ Records of lottery or gambling winnings and losses.
- ☐ Records of rental income and expenses, IRA contributions, and alimony paid or received.
- ☐ Mortgage Interest Statement - Form 1098 (including home equity loans); and records of the purchase or sale of your residence.
- ☐ Records of real estate and personal property taxes paid.
- ☐ Records of canceled debt amounts - Form 1099-C.
- ☐ Records of medical, eye care and dental expenses.
- ☐ Receipts for cash and non-cash charitable contributions.
- ☐ Tuition and Education Fees paid - Form 1098-T; and Student Loan Interest paid - Form 1098-E.
- ☐ Records of educator expenses paid.
- ☐ Records of moving expenses paid and any casualty or theft losses.
- ☐ Total amount paid for a day care provider and the day care provider's tax identifying number - the provider's Social Security Number or Employer Identification Number.
- ☐ Health Insurance Marketplace Statement - Form 1095-A.
- ☐ Health Coverage Statements from your Insurer or Employer - Form 1095-B/1095-C.
- ☐ Records of federal and state estimated taxes and foreign taxes paid.
- ☐ A copy of last year's federal and state tax returns, if available.

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What to Bring to a Financial Planning Session

Information that helps in creating a financial plan or portfolio plan is shown below. You don't have to bring all of the documents for the initial meeting, as long as you have a fairly good idea of the information in order to begin an initial outline of the plan. Actual documents can be provided when we are ready to create a specific plan or portfolio to meet your needs and expectations. Other helpful information includes current income, hobbies, short-term and long-term goals, philosophy on money, groups you belong to, expected changes in family situation, health concerns, retirement expectations, plans for creating additional income, etc.

Recommended Documents

- Bank Statements
- Pay Stubs
- Check Registers
- Credit Card Balances
- Mortgage or Loan Payment Books
- List of Liabilities
- Completed Expense Worksheet
- Wills, Trusts, Healthcare Powers of Attorney, Health Care Proxy or Other Powers of Attorney
- Business Agreements
- Retirement Accounts (IRA, 401k, 403b, pensions etc) Statements
- Social Security Statements
- Listing of Available Investment Options in Investment and Retirement Accounts
- Stock Options
- Homeowner and Automobile Declaration Pages
- Life, Disability or Long-Term Care Insurance Polices
- Business Liability, Director and Officer Insurance Policies
- Tax Estimate for Next Return (e.g., Deductions, Credits, etc.)
- List of Employee Benefits