New Clients Form

This checklist is used to make sure that you have everything needed to complete your tax return. Be sure to have all the following documents printed out and in hand at that start of your appointment. It is not necessary for you to fully fill in this form, but it is important for you to have all this information when you arrive. Please have the information in this order, it will help the appointment move quicker.

1. **Bring a copy of last year's tax returns, if available.**

2. ____
Name: Last, First, Middle Initial **Spouse: Last, First, Middle Initial**

3. ____
Date of Birth **Spouse Date of Birth**

4. ____
Phone Number **Spouse's Phone Number**

5. ____
Email Address **Spouse's Email Address**

6. ____
Physical Address

7. ____
Filing Status

8. Do you have any dependents? YES NO

9. Please provide Name, DOB, Social Security Number, and Relationship of each dependent on a separate form.

10. Should any dependents from last year be removed? YES NO

11. Were any of your dependents 19 years of age at the end of the year? YES NO

12. Were any of your dependents older than 19, under 24 and a full time student at the end of the year? YES NO

13. For Direct Deposit or Electronic Payment of Funds please fill out the following. You may also bring in a voided check.

Bank Name: ____

Routing #: ____

Account #: ____

Please bring the following items in order as seen below.

Income

14. W-2 Forms

15. Bring any 1095 form(s) for insurance coverage.

16. Interest Income (if applicable) 1099-int Form; or bank name and amount of interest paid to you.

17. Dividends (if applicable) 1099-Div Form

18. Business, Self-Employment, or Free-Lance Income (if applicable) 1099- Misc Form. Please make sure you bring all expenses paid for self-employment. If you have an in home office make sure to include the square footage of your office, and total square footage of your home excluding the garage. We need totals of Homeowners Insurance paid, any repairs, bills including water, etc.

19. Stock Sales (if applicable) 1099-B

20. Retirement Income, Pensions, Annuities (if applicable) 1099-R Form for any money pulled out, received, or rolled over to IRA's, 401K's, pensions, annuities, etc.

21. Rental Property (if applicable) make sure to bring the total income for each property for the year as well as all expenses totaled and categorized.

22. Partnership, S-Corp or Trust Income (if applicable) K-1 Forms

23. Unemployment Income, Gambling Winnings, and any other income (if applicable) 1099-G forms

24. Social Security Income (if applicable) SSA-1099 Form

General Deductions

25. Student loan interest (if applicable) 1098-E Form

26. Moving expenses (if you moved 50+ miles)

27. Alimony payments (provide the amount paid, and the name and ssn of the person paid)

28. Deposit to an Roth IRA, Traditional IRA, or SEP IRA (provide amount deposited to the account)

29. For Business Owner, Self-Employee, or Free Lance ONLY, provide health insurance payments.

General Tax Credits

30. Child care payments. Provide amount you paid to each care provider for each child. Bring the name, address, and phone number for each care provider. And, bring the SSN of the each care provider if it is a person, or bring the EIN if it is an organization.

31. College courses for you, your spouse, or any dependents. Provide 1098-T Form you received from each school, and the amount you paid for books and materials you purchased for the college courses.

32. Homeowners ONLY. For any improvements to your home that qualified for the Residential Energy Credits provide how much you spent for each improvement, and what the nature of each improvement is.

Itemized Deductions

33. If you have any itemized deductions please fill out the Itemized Deductions Form, provided on our website.