

NEW CLIENT PRIOR YEAR INFORMATION LIST CALL CHRIS AT 952-217-6261 WITH QUESTIONS

Please provide the following at your convenience:

- Complete state and federal tax returns for tax years 2022, 2023 and 2024
 - Include all schedules and carryovers
 - fixed asset schedules
 - depreciation schedules
 - rental loss carryovers if applicable
- Copies of 2024 tax documents used to prepare your 2024 returns
- Full names, social security numbers and dates of birth for all dependents
- Current email addresses for all individuals named on the tax returns
- Current home and cell phone numbers for all individuals named on the tax returns
- Complete social security numbers if not available on the tax returns or tax documents

We will use this information to assist us in creating your file for 2025 tax preparation.

E-mail chris@holmquisttax.com to setup a **client portal** to upload your documents or,

Mail to:

Holmquist Ltd
32 10th Ave S.
Suite 102
Hopkins, MN 55343

You can also schedule a drop-off. Our office hours are 10-3 Monday through Friday.