SUNRISE TAX SOLUTIONS
Serving Southern California

Sunrise Tax Solutions
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- Individual Taxes
- Sole Proprietor
- Estimated Taxes
- Tax Planning
- IRS/FTB Letters

NEW CLIENT FORM

My first recommendation is that once you are ready to start, contact me via email or phone, and I will email you the “Secure Link through Intuit” to upload all your information and documents. We can complete the return electronically and you never have to leave your home.

If you are not comfortable uploading your documents, you can drop off your paperwork at my home office in Vista. I will contact you once your return is complete, and we can set up a time to review and finalize your return. Please be sure to set up an appointment with me if you choose to drop off your info. Or you can mail your information to me.

1. Fill out the form. If you fill this out digitally, save as a new document, name it and email it to me. If you fill it out by hand, you can scan it (or take a good photo) and email or text it to me.

2. Provide last year’s tax return

3. Be prepared to provide the items from page 2.

Full Name ____________________ SS #____________________ Birth date ____________________

Address ____________________ City ____________________ State _____ Zip ____________________

Email ____________________ Occupation ____________________

Mobile #____________________ Home # ____________________

Spouse Full Name ____________________ SS #____________________ Birth date ____________________

Address ____________________ City ____________________ State _____ Zip ____________________

Email ____________________ Occupation ____________________

Mobile #____________________ Home # ____________________

Dependent #1

Full Name ____________________ SS #____________________ Birth date ____________________

Dependent #2

Full Name ____________________ SS #____________________ Birth date ____________________

Dependent #3

Full Name ____________________ SS #____________________ Birth date ____________________

Dependent #4

Full Name ____________________ SS #____________________ Birth date ____________________

See Page 2 for more information.

SUNRISE TAX SOLUTIONS

Ready to file? Call us at **(951) 546-4188** to make an appointment.
We will create a secure online folder where you can upload all your documents.

PERSONAL INFORMATION

*Provide **all** documents that apply:*

- ☐ Valid picture ID
- ☐ Social Security Card, as well as those of anyone you may be claiming on your tax return, including your spouse if you are filing jointly
- ☐ Tax return from last year (New Clients)

PROOF OF INCOME

*Provide **all** documents that apply:*

- ☐ W-2s for all jobs last year
- ☐ 1099s for all contract work, COD, or any others
- ☐ 1099Rs from retirement income
- ☐ Statements for prizes, scholarships/ fellowships, or lottery/gambling winnings
- ☐ Income from unemployment or social security benefits
- ☐ Income from the previous year's state and local tax returns
- ☐ Income from any rental properties you may own
- ☐ Income adjustment, credit, and deduction documents
- ☐ Broker statements from investment income

OTHER DOCUMENTS

*Provide **all** documents that apply:*

- ☐ Contributions and distributions from HSA or MSA
- ☐ Contributions to an IRA
- ☐ Interest from bank accounts, investments, stocks, or other property
- ☐ Costs related to education (1098-T and 1098-E)
- ☐ Costs related to medical care from prescriptions, doctors, hospitals, or other providers

ADDITIONAL ITEMS

*Provide **all** documents that apply:*

- ☐ Child care expenses: provider's address, phone #, and federal tax ID # and amount paid
- ☐ Homeowners: 1098 mortgage statement & property tax bill
- ☐ Education: 1098-T college tuition and 1098-E student loan statements
- ☐ Alimony paid or received
- ☐ 1095A and Form 3895 California Health Insurance Marketplace Statement, if you had coverage through the Marketplace
- ☐ Notices and letters from: IRS, state tax, health insurance marketplace, or anything that says tax document
- ☐ Estimated payments made, date & amount for each

IMPORTANT TAX DOCUMENTS

*Provide **all** documents that apply:*

- ☐ Receipts from charitable donations
- ☐ Receipts from moving expenses for active military only
- ☐ Bank account and routing number if you want your refund direct deposited

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