

Kaminski & Co.



Name: _____ Phone: _____
Email: _____

1. Did you move at any time during 2019? ___Y or ___N
 - a. When?
 - b. New address?
2. Did you get married, divorced, or have a child in 2019? ___Y or ___N
 - a. Spouse's name, birthday, ssn?
 - b. Child's name, birthday, ssn?
3. Did any of your children graduate high school in 2019? ___Y or ___N
 - a. Attending college?
 - b. Do you have a 1098-T?
4. Did any of your children graduate college in 2019? ___Y or ___N
 - a. When?
5. Would you like to e-file and direct deposit? ___Y or ___N
 - a. need bank info/voided check
6. Did you make any Federal estimated payments? ___Y or ___N
 - a. dates and amounts of payments?
7. Did you make any State estimated payments? ___Y or ___N
 - a. dates and amounts of payments?
8. Are these all of your tax documents? ___Y or ___N
 - a. If no, what is still outstanding?
9. Did you have health insurance for the entire year? ___Y or ___N (1095-A Obamacare?)

Any additional information dropped off after completion of your return will result in an additional reprocessing fee.

Above is true and correct:

Signature: _____ Date: _____

I consent to have my returns E-filed:

Signature: _____ Date: _____

Above email is correct and desire to have my returns electronically/securely sent to me:

Signature: _____ Date: _____