DATE	CLIENT ID#
DAIE	CLIENT ID#

Entered By:_____

Time:_____

LIST OF DOCUMENTS AND INFORMATION

• CURRENT IDENTIFICATION FOR BOTH AND SOCIAL SECURITY CARDS OR ITIN (TAXPAYER, SPOUSE, AND DEPENDENTS)

TAX YEAR:20212022	20232024	AMENDMENT - IF	YES, YEAR	BUSIN	ESS TAXES
IF NEW INFORMATION: AI	DDRESS			APT	NO
ΓΥ	STATE	E	ZIP		_ PHONE
MBERS: TAXPAYER HOME		CELL	TEXT CA	ARRIER	SPOUSE
ME0	CELL	WORK			
[AIL:					
NEW OCCUPATION: TAXPAY	YER		SPOUSE		
NEW DEPENDENTS:					
ME		BIRTH DATE _	SSN		
LATIONSHIP	STUDENT	: YES NO	PERM DISABILIT	Y: YES NO	_
FORM OF REFUND RECEIV	'AL SECU	JRITY QUESTION:	ANSWER:		· · · · · · · · · · · · · · · · · · ·
DIRECT DEPOSIT SAM	ME ASTAST VEAD	CHECK DICK TID	ADVANCE LOAN	CHECK MAII	ED HOME
DIRECT DEFOSITSAN	WIE AS LAST TEAR_	CHECK FICK-UF	ADVANCE LOAN	CHECK MAIL	ED HOME
- IF DIRECT DEPOSIT: BANK	NAME	ROUT#		_ ACCT#	
CHECK MAILED HOME EE	EES MUST BE PAID	HERE - CREDIT/DE	BT CARD THERE W	VILL BE A 3.5% FEE	ADDED
- CHECK MAILED HOME, <u>FE</u>	ES MEST DE TITLE				
				CASH CHECK	
PAYMENT METHOD:F	FROM REFUNDD			_CASHCHECK	
PAYMENT METHOD:F DOCUMENTS TO PRESENT	ROM REFUNDD	DEBIT/CREDIT CARD _	_ZELLEACH _		
PAYMENT METHOD:F DOCUMENTS TO PRESENT (NEW CLIENTS)LAST YI	ROM REFUNDD	DEBIT/CREDIT CARD _	_ZELLEACH _		
PAYMENT METHOD:F DOCUMENTS TO PRESENT (NEW CLIENTS)LAST YII INCOME	FROM REFUNDD	DEBIT/CREDIT CARD _ PREPARATION FEE	_ ZELLEACH \$		
PAYMENT METHOD:F DOCUMENTS TO PRESENT (NEW CLIENTS)LAST YI INCOMEW-2LAST PAY STUB _	FROM REFUNDD EARS TAX RETURNUNEMPLOYMEN	DEBIT/CREDIT CARD _ PREPARATION FEE TSCHEDULE K-1 _	_ZELLEACH _ \$ SELF-EMPLOYED	OR OWN A BUSINES	ss
PAYMENT METHOD:F DOCUMENTS TO PRESENT (NEW CLIENTS)LAST YI INCOMEW-2LAST PAY STUBOTHER 1099 FORMS40	FROM REFUNDD EARS TAX RETURNUNEMPLOYMEN' D1 (K)IRAOT	DEBIT/CREDIT CARD _ PREPARATION FEE TSCHEDULE K-1 _ THER RETIREMENT	_ ZELLEACH _ \$ SELF-EMPLOYED RETIREMENT DIST	OR OWN A BUSINES	SS
PAYMENT METHOD:F DOCUMENTS TO PRESENT (NEW CLIENTS)LAST YII INCOME W-2LAST PAY STUB _ OTHER 1099 FORMS40 GAMBLING WINNINGS (W	FROM REFUNDD EARS TAX RETURN UNEMPLOYMEN' D1 (K)IRAOT V-2G)MISC INCO	DEBIT/CREDIT CARD _ PREPARATION FEE TSCHEDULE K-1 _ THER RETIREMENT _ DMEDIVIDENDS _	_ZELLEACH _ \$ SELF-EMPLOYED RETIREMENT DIST BANK INTEREST	OR OWN A BUSINES	SS
PAYMENT METHOD:F DOCUMENTS TO PRESENT (NEW CLIENTS)LAST YII INCOMEW-2LAST PAY STUBOTHER 1099 FORMS40 _GAMBLING WINNINGS (W _RENTAL PROPERTY INCOME	FROM REFUNDD EARS TAX RETURN UNEMPLOYMEN' 01 (K)IRAOT V-2G)MISC INCO DME AND EXPENSE	DEBIT/CREDIT CARD _ PREPARATION FEE TSCHEDULE K-1 _ THER RETIREMENT _ DMEDIVIDENDS _ ESALIMONY PAID _	_ZELLEACH _ \$ SELF-EMPLOYED RETIREMENT DIST _BANK INTEREST _RECEIVED	OR OWN A BUSINES	SS
PAYMENT METHOD:F DOCUMENTS TO PRESENT (NEW CLIENTS)LAST YI INCOME W-2LAST PAY STUB _ OTHER 1099 FORMS40 GAMBLING WINNINGS (W RENTAL PROPERTY INCOSOCIAL SECURITY BENE	FROM REFUNDD EARS TAX RETURN UNEMPLOYMEN' 101 (K)IRAOT V-2G)MISC INCO DME AND EXPENSE FITSTAXPAYER	PREPARATION FEE TSCHEDULE K-1 _ THER RETIREMENT _ DMEDIVIDENDS _ ESALIMONY PAID _ ESSPOUSECHILD	_ZELLEACH _ \$ SELF-EMPLOYED RETIREMENT DIST BANK INTEREST _RECEIVED	OR OWN A BUSINES	SS
PAYMENT METHOD:F DOCUMENTS TO PRESENT (NEW CLIENTS)LAST YI INCOME W-2LAST PAY STUBOTHER 1099 FORMS40 GAMBLING WINNINGS (WRENTAL PROPERTY INCOSOCIAL SECURITY BENEPROPERTY TAXESMO	FROM REFUNDD EARS TAX RETURN UNEMPLOYMEN' 01 (K)IRAOT V-2G)MISC INCO DME AND EXPENSE FITSTAXPAYER DRTGAGE INTERES'	PREPARATION FEE TSCHEDULE K-1 _ THER RETIREMENT _ DMEDIVIDENDS _ ESALIMONY PAID _ ESSPOUSECHILD T (1098)JANUARY	_ZELLEACH _ \$SELF-EMPLOYED RETIREMENT DIST _BANK INTEREST _RECEIVED STATEMENT	OR OWN A BUSINES	SS
PAYMENT METHOD:F DOCUMENTS TO PRESENT (NEW CLIENTS)LAST YI INCOME W-2LAST PAY STUB _ OTHER 1099 FORMS40 GAMBLING WINNINGS (W RENTAL PROPERTY INCO SOCIAL SECURITY BENE PROPERTY TAXESMO CLOSING DOCUMENTS-H	FROM REFUNDD EARS TAX RETURN UNEMPLOYMEN' 101 (K)IRAOT V-2G)MISC INCO DME AND EXPENSE FITSTAXPAYER DRTGAGE INTERES' IUD-1PURCHASI	PREPARATION FEE TSCHEDULE K-1 _ THER RETIREMENT _ DMEDIVIDENDS _ EALIMONY PAID _ ESPOUSECHILD T (1098)JANUARY S EREFINANCES	_ZELLEACH _ \$ SELF-EMPLOYED RETIREMENT DIST BANK INTEREST _RECEIVED STATEMENT OLD	OR OWN A BUSINES RIBUTION	SS
PAYMENT METHOD:F DOCUMENTS TO PRESENT (NEW CLIENTS)LAST YI INCOME W-2LAST PAY STUB _ OTHER 1099 FORMS40 GAMBLING WINNINGS (W RENTAL PROPERTY INCO SOCIAL SECURITY BENE PROPERTY TAXESMO CLOSING DOCUMENTS-H STUDENT LOANSHIG	FROM REFUNDD EARS TAX RETURN UNEMPLOYMEN' 101 (K)IRAOT V-2G)MISC INCO DME AND EXPENSE FITSTAXPAYER DRTGAGE INTERES' IUD-1PURCHASI THER EDUCATION CO	PREPARATION FEE TSCHEDULE K-1 _ THER RETIREMENT _ DMEDIVIDENDS _ EALIMONY PAID _ ESPOUSECHILD T (1098)JANUARY SE COSTSDONATIONS	_ZELLEACH _ \$ SELF-EMPLOYED RETIREMENT DIST BANK INTEREST _RECEIVED STATEMENT OLDNON-MONETAR	OR OWN A BUSINES RIBUTION RY DONATIONS	
PAYMENT METHOD:F DOCUMENTS TO PRESENT (NEW CLIENTS)LAST YI INCOME W-2LAST PAY STUBOTHER 1099 FORMS40 GAMBLING WINNINGS (WRENTAL PROPERTY INCOSOCIAL SECURITY BENEPROPERTY TAXESMOCLOSING DOCUMENTS-HSTUDENT LOANSHIG CHILD CARE INFORMATIO	FROM REFUNDD EARS TAX RETURN UNEMPLOYMEN' 01 (K)IRAOT V-2G)MISC INCO DME AND EXPENSE FITSTAXPAYER DRTGAGE INTERES' IUD-1PURCHASI HER EDUCATION CO DN - PLEASE HAVE:	PREPARATION FEE TSCHEDULE K-1 _ THER RETIREMENT _ DMEDIVIDENDS _ ESALIMONY PAID _ ESPOUSECHILD T (1098)JANUARY S EREFINANCESE COSTSDONATIONS PROVIDER NAME, AD	_ZELLEACH _ \$SELF-EMPLOYED RETIREMENT DIST _BANK INTEREST _RECEIVED STATEMENT OLDNON-MONETAR DRESS, PHONE#, SO	OR OWN A BUSINES RIBUTION RY DONATIONS DCIAL SECURITY# O	R FED ID, AMOUN
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