Peace of Mind
Tax Services

NEW/UPDATE TAX CLIENT CHECKLIST

Please provide a full copy of last year's Federal and State(s) tax returns AND

Review Required Items to Begin Tax Preparation below

TAXPAYER NAME____ US CITZEN: YES/NO

SPOUSE NAME____ US CITZEN: YES/NO

OCCUPATION/TAXPAYER ________________________________ OCCUPATION/SPOUSE______________________________________

SSN_______________________ BIRTHDATE_________________ SSN____________________ BIRTHDATE____________________

ADDRESS ____CITY________________________STATE_______ZIP______________

PHONE ____

*IF MAILING ADDRESS ON TAX RETURNS DIFFERENT, PLEASE PROVIDE HERE:

____

TAXPAYER EMAIL ADDRESS ____

SPOUSE EMAIL ADDRESS____

FILING STATUS INFORMATION:

INDICATE AN "X" FOR MARTIAL STATUS ON THE LAST DAY OF LAST YEAR (i.e. 12/31/XX)

_________ SINGLE

_________ MARRIED, FILING JOINTLY

_________ MARRIED, FILING SEPERATELY - If yes, did you live together at any time after June 30? ☐Yes ☐ No

_________ HEAD OF HOUSEHOLD (Unmarried and providing more than half the cost of a home for a dependent)

_________ WIDOWED W/ DEPENDENT CHILD: Year of Spouse's death _______________

_________ NONRESIDENT ALIENT SPOUSE, CHECK HERE

If necessary, attach additional schedule with dependent information

Dependents: (**List youngest first**) Name (first, middle initial and last name)	DOB (month/day/yr)	Dependent's SSN	Relationship to you	Months lived in home	US Citizen/Resident of US, Canada or Mexico	Full time student

REQUIRED ITEMS TO BEGIN TAX PREPARATION

* Copy of social security cards for all persons on tax returns - (*NEW clients only*)
* Proof of identity for taxpayer & spouse (i.e. ID card or driver's license) - (*NEW clients only*)
* Income documents: Form W-2 (include job titles), Form-1099s (rent/royalties, interest, dividend, capital gain/loss, pension, retirement, gambling winnings, social security, cancellation of debt, etc.)
* Proof of payment and date paid for estimated taxes (if applicable)
* For Small Businesses and Rental Properties, select Schedule C and/or Schedule E links to provide annual income and expenses (additional items may be requested through email or by phone).
* Complete Client Document Submission Form to include with this form and your associated tax documents.