



NEW/UPDATE TAX CLIENT GENERAL INFORMATION

If NEW, please provide a full copy of last year's Federal and State(s) tax returns AND

Review Required Items below to Begin Tax Preparation

TAXPAYER NAME _____ US CITIZEN: YES/NO

SPOUSE NAME _____ US CITIZEN: 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 ALIEN TAXPAYER; NR SPOUSE CHECK HERE

If necessary, attach additional schedule with dependent information

Dependents: (List youngest first) Name (first, middle initial & last name)	DOB (mm/dd/yyyy)	Dependent's SSN	Relationship to you	Months lived in home	US Citizen/Resident of US, Canada or Mexico	FT 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 Tax Client Checklist Form to include with this form and your associated tax documents.