

Client checklist for 2023 tax preparation

HOME PHONE _____ WORK PHONE _____

CELL PHONE _____

EMAIL ADDRESS _____

Please circle how you prefer to be contacted ~ Home, work, cell, email

(NAMES AS CURRENTLY SHOWN ON SOCIAL SECURITY CARD)

NAME _____ BIRTHDATE ___/___/___

SPOUSE NAME _____ BIRTHDATE ___/___/___

OCCUPATIONS--YOU _____ SPOUSE _____

BLIND, DEAF OR DISABLED? YOU ___ SPOUSE ___

ISSUE DATE ON YOUR DRIVERS LICENSE ___/___/___ SPOUSE ___/___/___

(new clients, I will need to see your drivers lic)

ADDRESS _____

CITY-ZIP CODE _____

SCHOOL DISTRICT _____

Are either of you a disable Vet? Yes _____ % of disability No _____

DEPENDENTS (children)

(NAMES AS CURRENTLY SHOWN ON SOCIAL SECURITY CARD)

NAME _____ S.S. NUMBER ___/___/___

RELATIONSHIP _____ BIRTHDATE ___/___/___

NAME _____ S.S. NUMBER ___/___/___

RELATIONSHIP _____ BIRTHDATE ___/___/___

REMEMBER TO BRING:

ALL W2'S AND 1099'S and 1098'S YEAR END PAY STUBS (if you have them)

MORTGAGE STATEMENTS

TAX BILLS PAID AND (IF DIFFERENT) TAX BILLS DUE (may need both for some people)

ALL BROKERAGE STATEMENTS. THIS INCLUDES K-1'S

Please fill out this section!!!!!!

DIRECT DEPOSIT OF REFUND Same account as last year ___ I do not want direct deposit ___

New account information!

Bank Name _____ Routing Number _____ Account Number _____

Account Type ___ ("C" for checking "S" for saving)