**New Tax Client Checklist**

**Individual**

**Taxpayer Name:**

**Spouse’s Name:**

**Address:**

**Phone Number:**

**E-mail:**

**Taxpayer SSN & DOB:**

**Spouse SSN & DOB:**

**Dependents: (Name, SSN & DOB)**

Information we will need for preparation of Return:

\_\_\_\_\_ Previous years Income Tax Returns

\_\_\_\_\_ Wage & Income Information (W’2’s, 1099’s)

\_\_\_\_\_ Interest and/ or Dividend Income

\_\_\_\_\_ Form 1098 Mortgage Interest

\_\_\_\_\_ Property Tax Bill

\_\_\_\_\_ Childcare information (location, amount paid & who they cared for)

\_\_\_\_\_ School information (name of school, name of student, tuition or fees paid, uniforms & supplies)

\_\_\_\_\_ Information on any large purchases (vehicle, house, etc)

\_\_\_\_\_ Rental property information if any owned

\_\_\_\_\_ If self-employed Income & Expenses (name of business, is it operated out of your home)

\_\_\_\_\_ If home office – total sq ft of home and sq ft of office space

\_\_\_\_\_ If sales of stock – need date purchased and what cost