There is basic information we need to collect from every new client. Please help us by filling out our new client form. The goal is to make this as simple as possible for you. Please contact us with any questions or concerns.

\*\*Please check bottom of this document for helpful details.

Personal Information



Name:

Phone Number and Email address:

Date of Birth:

Social Security Number:

Copy of current driver’s license:

Current Mailing Address:

Health Insurance: (Yes or No) if yes please provide 1095 form

Copy of last tax return(s) filed:

Bank Account Info for tax return direct deposit: (copy of voided check or account and routing numbers)



Do you have any dependents?: Children or family members that live with you that you support. For each dependent we need Name, Date of Birth and Social Security Number

\*\*Sources of Income: W2 etc. Please see bottom of document.

\*\*Personal Deductions: Please see bottom of document for details.

\*\*Sources of income:

W2

State refunds (when taxable)

Social security

Unemployment benefits.

Interest Income (Form 1099-INT or substitute)

Dividend Income (Form 1099-DIV or substitute)

Self-Employment Income (Form 1099-MISC)

Sales Commissions (Form 1099-MISC)

Pension Retirement Income (Form1099-R)

IRA or 401(k) Distribution Income (Form1099-R)

Gambling or Lottery Winnings (Form W-2G)

Alimony Income

Rental Income

Sale of Business Assets

Sale of Personal Residence

Stock and Bond Sales (Form 1099-B)

Income From Partnerships, Corporations, Trusts, Estates (Schedule K-1)

\*\*Personal deductions:

Medical expenses in excess of 10% of AGI (7.5% if you're over 65).

Mortgage interest, property taxes, and mortgage insurance.

Points you paid to obtain a mortgage.

Charitable contributions.

Job search expenses.

Educator expenses.

Student loan interest.

Tuition and fees deduction.

Deductible retirement contributions, such as to a traditional IRA.

Moving expenses, as long as the move was related to the start of a new job.