New Client Checklist

CHECKLIST

☐	Driver's License	For everyone filing a return If submitting copies, please provide both the front and back of each.
☐	Proof of Identity:	Dates of birth and social security numbers for everyone on the return. This includes spouses and dependents.
☐	Last 2 years income tax returns	Federal and State
☐	Bank account and routing number	Optional for direct deposit and withdrawals
☐	W-2s	For everyone on the return
☐	1099s	1099-MISC 1099-Int 1099-Div 1099-B
☐	1095	Proof of health insurance
☐	Social security statement	
☐	Stock broker statements	Did you sell any stocks? If yes, --please provide the purchase date and the cost basis. (Long -term, short-term, etc.)
☐	IRA's	
☐	Property tax bills	
☐	Tuition payments	1098 1098-T
☐	Charitable Donations	Cash receipts Proof of transactions
☐	Mortgage	Closing paperwork on new mortgages
☐	Medical Expenses	Invoices
☐	Automotive	New auto purchases Mileage receipts Tolls (work related)
☐	Estimated tax payments	If you made any estimated tax payments to the IRS or the state, please provide receipts or copies of cashed checks.
☐	Child Care	Provider EIN or SSN Proof of payments made for the tax year: cash receipts, statement from provider, bank statements, and invoices.
☐	Retirement savings	
☐	Energy Credits: NEW furnace, windows, etc.	Receipts/ invoices