

<b><u>CLIENT NAME</u></b>	
<b>BASIC INFORMATION - NEW CLIENTS ONLY: (Existing clients provide updates)</b>	
Date of Birth - include for any dependents	
Social Security # - include for any dependents	
Mailing Address	
E-mail address	
Cell Phone	
Occupation	
Filing Status (single, married joint, head of household)	
<b>Copy of Last Year's Tax Return</b>	
<b>Any changes to Direct Deposit Account from last year? Provide last 4 digits of bank account if unchanged and full routing and account number if a new account</b>	
<b>Driver License info: Issuing State, License Number - Issue Date - Expiration Date - Back of License first 3 characters of document code for NY</b>	
Alternatively send front and back of Driver License	
<b>INCOME:</b>	
W2s if employed or 1099s for self-employment income	
<b>OTHER FORMS OF INCOME OTHER THAN W2, 1099 &amp; IRA DISTRIBUTION</b>	
Interest & Dividends (1099B or 1099 Div)	
Unemployment (1099-G), Social Security (1099-SA)	
HSA 1099	
Alimony	
Retirement income/withdrawal, pension income, death benefits (1099-R)	
IRA/401K DISTRIBUTION COVID RELATED? IF YES DISCUSS WITH YOUR TAX PREPARER	
Business income associated with a K-1	

Gambling winnings (W2G)	
Debt forgiveness (1099A for abandoned property or 1099C for cancellation of debt.	
<b>STOCK SALES:</b>	
<b>Need purchase and sales information; including dates, number of shares, purchase price and sales price (1099-B)</b>	
<b>Did you purchase or sell any virtual currency in 2022? (e.g. bitcoin)</b>	
<b>If so, we need purchase and sale information; including dates, quantity and purchase and sales prices.</b>	
<b>HEALTH CARE FORMS:</b>	
Form 1095-A if purchased insurance through exchange - may be credits that may need to be repaid.	
<b>GENERAL EXPENSES FOR SELF-EMPLOYED ONLY (UNREIMBURSED):</b>	<b>DOLLAR AMOUNTS - UNREIMBURSED</b>
Charitable Donations	
Job search expenses (travel for interviews, suit purchases, resume writing)	
Prior Year's Tax Preparation Costs	
Student Loan Interest	
Electronic purchases (new computer, IPAD, IPHONE, Kindle, GPS, etc)	
Computer Supplies (flash drives, ink cartridges, security software, etc)	
Monthly Internet Cost	
New cell phone or blackberry	
Monthly Cell Phone Cost (any reimbursement from company?)	
Journals and periodicals (Wall Street Journal)	
Books	
Luncheons	
Educational Costs	
Networking Events	
Unreimbursed office supplies	
Attache case, laptop bag	

Seminars, trade shows.	
Office decorations	
Business Gifts	
Job related overnight travel - how many nights?	
Luggage	
Licensing/certification fees	
Safety Deposit Box	
Investment Advisory Fees, IRA fees	
Certain legal fees	
<b>SALESPERSON JOB RELATED EXPENSES - SELF EMPLOYED ONLY (UNREIMBURSED):</b>	<b>DOLLAR AMOUNTS - UNREIMBURSED</b>
Travel to clients that is not reimbursed (tolls, cabs, parking, zip car - or mileage if you use personal auto)	
If you used your personal auto - how many total miles did you drive, what kind of car did you use, how many were business miles, and are you reimbursed at all by the company?	
Meals and Entertainment	
<b>HOME OFFICE JOBS - SELF EMPLOYED ONLY - must work almost exclusively from home:</b>	
Square footage of apartment	
% dedicated to office	
Monthly rent	
Monthly utilities	
Furniture purchased for office (desk, chairs, filing cabinet)	
<b>PROPERTY OWNERS:</b>	
Property Taxes	
Mortgage Interest	
Rental income and expenses for rental property	
Settlement Statement if purchased during tax year	

<b>DEPENDENT CARE EXPENSES:</b>	
Name of Provider	
EIN # if business or SS# if individual care giver	
Address	
Amount paid; broken down by child	
<b>MEDICAL EXPENSES - MUST EXCEED 7.5% OF INCOME</b>	
Break down by prescriptions, co-pays, dentists, travel, equipment, etc.	
<b>529 Plan contributions or withdrawals</b>	
Annual statement for the 529 plan listing contributions	
Withdrawals will be on form 1099-Q	
<b>Foreign Investments or holdings</b>	
Foreign accounts exceeding \$10,000 we need name of institution, address, account number, highest balance reached and date when reached last year.	
<b>Energy Credits</b>	
Restricted to solar purchases or new furnaces, windows.	
<b>If you can think of any other business related expenses itemize them below:</b>	