

Client Information

		Social Security Number	Date of Birth
Taxpayer Name			
Spouse Name			
Address			
Preferred Contact			
Phone Number	Cell:	Home:	Work:
Email Address			

Marital status as of the last day of the year

- Single
- Married
- Single claiming a child or children

Children's Name	Relationship	Social Security Number	Date of Birth

Items to bring with you

- At least one if not two of your most recent filed tax returns
- Your current year's tax documentation including but not limited to:
 - W-2's, 1099's, etc.
- Additional information needed to prepare your return, for example
 - Quickbooks/ Quicken files
 - Supporting documentation
 - Questions to review
 - Any information regarding changes from your last year's tax return