

20. Did the IRS Take Last years tax return? yes no

21. Do you have a Hobby or a Business that earns money?
(example: beauty; baking; arts and crafts; computers and
technology) Tell me about it?

Client Name:

D.O.B.: _____ SSN: _____ Ph#: _____

Email Address:

Spouse : _____

D.O.B.: _____ SSN: _____ Ph#: _____

Email Address:

Home Address:

City: _____ State: _____ Zip: _____

Phone #: _____ wk#: _____

*** I need the following items to complete your taxes: DRIVERS
LICENSE OR STATE ID & SOCIAL SECURITY CARD for YOU and EVERY
dependent All of the w2s, 1099s, 1098s and other tax documents that

you have. A 1095 for your health insurance is needed if applicable. Any interest statements for mortgages, and capital gains information from investments. Be sure to give me what you have. Thanks