Client Information Sheet

Our Client Information Sheet will help you plan and gather important information that will help us in our upcoming conversation.

Please include a cover letter with the following:
Name, Phone Number & E-mail
Updated Address (if moved)
New Addition to the family (babies name, birth date & social security number)
Include a voided check for refund to be direct deposited (optional)

Documents & Info needed for return
W-2's, 1099's
Interest & Dividends (Forms: 1099INT/ 1099 DIV)
Brokerage Account Statements (1099B **Very Important***)*
IRA Contributions
**Unemployment- Needs a 1099G Tax Form (*needs to be printed it out on www.njuifile.net)*

If retired:
Social Security Statement
Pensions (1099R)
IRA Distributions

Deductions:
Mortgage Interest and Taxes
Total Charitable Contributions
Medical Totals- (**Must be the Total Sum** not individual receipts)
Includes: Dental, Vision, and Health Ins. Premium, Long Term Care, Doctors and Prescriptions
College Tuition: **<u>Important to have the 1098T Form</u>**
*(Student/Child may have received this form from their school, usually via email) 1095 A – Insurance form if Insurance

purchased through Marketplace

Payments:
Estimated Federal and State Tax payments (for year 2022)
April 1, 2022- January 15, 2023

New Clients need: (In addition to the above)
Last year’s tax return
Date of Birth & Social Security # of everyone in Household