

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: **Important to have the 1098T Form**

*(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