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**PLEASE PROVIDE US WITH YOUR PRIOR YEAR FEDERAL AND STATE INCOME TAX RETURNS (IF POSSIBLE 2 YEARS)**

### NEW CLIENT INFORMATION

Taxpayer Name \_\_\_\_\_ Social Security # \_\_\_\_\_ Date of Birth \_\_\_\_\_

Spouse Name \_\_\_\_\_ Social Security # \_\_\_\_\_ Date of Birth \_\_\_\_\_

**PLEASE PROVIDE US WITH A COPY OF YOUR DRIVER'S LICENSE AND SOCIAL SECURITY CARD**

Are you or your spouse Blind? \_\_\_ Self \_\_\_ Spouse How did you hear about us? \_\_\_\_\_

Have you experienced Identity Theft pertaining to your tax return filing? \_\_\_\_\_

Taxpayer Occupation: \_\_\_\_\_ Spouse Occupation: \_\_\_\_\_

Taxpayer Email \_\_\_\_\_ Spouse Email \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Do you Own? \_\_\_ Or Rent? \_\_\_ Preferred Method of Communication: \_\_\_ Email \_\_\_ Phone

Primary Contact for Tax Matters \_\_\_\_\_ Home Phone Number \_\_\_\_\_

Taxpayer Cell Phone \_\_\_\_\_ Spouse Cell Phone \_\_\_\_\_

Best Time to Reach You \_\_\_\_\_

Do you want to E-file your returns \_\_\_ Yes \_\_\_ No Do you want any refund direct deposited into your bank account? \_\_\_ Yes \_\_\_ No

Bank Name \_\_\_\_\_ Type of Account \_\_\_ Checking \_\_\_ Savings

If filing a married filing joint tax return is the bank account in both names? \_\_\_ Yes \_\_\_ No

**Bank account must be in either the taxpayer or spouse's name it cannot be someone else's account**

Account Number \_\_\_\_\_ Routing Number \_\_\_\_\_

**Please DO NOT take this information off of a deposit slip. Take it off a check or contact your bank.**

Date of Last Will Revision \_\_\_\_\_ Date of Last Estate Plan Review \_\_\_\_\_

Filing Status	
Single	
Can someone Else Claim You? (Yes, No, Unsure)	
Married Filing Joint	
Surviving Widow(er) (with dependent child)	
Head of Household	
Married Filing Separately	
Spouse's Name	
Spouse's Social Security #	

Events That Happened During the Year (check all that apply)	
Change in Number of Dependents	
Married/Divorced/Spouse Died (please indicate which)	
You, Spouse or Dependent reached age 65	
Converted a Traditional IRA to a Roth IRA (What Year?)	
Bought/Sold/Refinanced a home	
(We will need a copy of the closing statement)	

Dependents					
Please provide us a copy of all dependents social security cards & birth certificates					
Please provide proof of residence for all dependents (i.e. school or medical records)					
Name	Relationship	Social Security #	Date of Birth	Months in Home	% of Support

**\*\*PLEASE COMPLETE THE FOLLOWING DISCLOSURE OF FOREIGN ASSETS FORMS. WE WILL NOT BE ABLE TO COMPLETE YOUR RETURN WITHOUT THIS FORMS BEING COMPLETED\*\***

**PLEASE NOTE THAT IF YOU HAVE ANY FOREIGN ASSETS THAT NEED TO BE DISCLOSED THIS REPORTING MUST BE DONE BY APRIL 18<sup>TH</sup>**

ALL TAXPAYERS MUST COMPLETE THIS DISCLOSURE CHECKLIST EACH YEAR DUE TO THE POSSIBILITY OF A SIGNIFICANT PENALTY AND THE LOSS OF TAX RETURN STATUTE OF LIMITATIONS

**Disclosure of Foreign Assets**

Yes

No

Do you own directly or with others any foreign stock or securities, financial instruments, foreign issued annuities or life insurance, foreign hedge or private equity funds?

\_\_\_\_\_

If so, in what country?

\_\_\_\_\_

Estimated value of on 12/31/2021

\_\_\_\_\_

Do you have a retirement or deferred compensation plan/account in another country?

\_\_\_\_\_

If so, in what country?

\_\_\_\_\_

Fair Market Value of on 12/31/2021

\_\_\_\_\_

Description and estimated value of the assets:

\_\_\_\_\_

Do you have a bank/brokerage account or a custodial account in another country?

\_\_\_\_\_

If so, in what country?

\_\_\_\_\_

Highest value of the bank account during the year:

\_\_\_\_\_

Do you have any other assets outside the US such as land?

\_\_\_\_\_

If so, in what country?

\_\_\_\_\_

Description and estimated value of the assets:

\_\_\_\_\_

At any time during 2021, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country?

\_\_\_\_\_

If so, in what country?

\_\_\_\_\_

**Note: you may be required to file Form TD F90-22.1 to report that financial interest or signature authority**

During 2021, did you receive a distribution from, or were you the grantor of, or transferor to a foreign trust?

\_\_\_\_\_

If so, in what country?

\_\_\_\_\_

**Note: you may have to file Form 3520**

**The above information is correct to the best of my knowledge.**

Taxpayer Signature:

Date:

Print Name:

Phone Number:

Spouse Signature:

Date:

Print Name:

Phone Number: