

<b><u>CLIENT NAME</u></b>	
<b>BASIC INFORMATION - NEW CLIENTS: (Existing clients provide updates)</b>	
Date of Birth - include for any dependents	
Social Security # - include for any dependents	
<b>NEW REQUIREMENT FOR 2017 BY THE IRS:</b> Driver Licence # 9 digit id, state, date issued, expiration date of the license ,also requires a 8-10 digit code if a NY license which is located at the bottom of the license - or on the back if issued after a specific date in 2014). ID for the spouse as well if a joint return. If you can, provide copy of the ID (front and back).	
If you do not have a drivers license provide one of the following: state issued ID card, passport, account statement from financial institution, utility billing statement or credit card billing statement.	
Mailing Address	
E-mail address	
Cell Phone	
Occupation	
Filing Status (single, married joint, head of household)	
<b>Copy of Last Year's Tax Return</b>	
<b>Any changes to Direct Deposit Account from Last Year? Provide last 4 digits of bank account</b>	
<b>HEALTH INSURANCE COVERAGE</b>	
Did all Family Member have health insurance last year?	
Full Year? Partial Year?	
<b>Did you get insurance through your employer?</b>	

<b>Provide us with form 1095 (A, B or C)</b>	
<b>INCOME:</b>	
W2s or 1099s	
1099-SA and 5498-SA for Health Savings Accounts	
<b>OTHER FORMS OF INCOME OTHER THAN W2, 1099 &amp; IRA DISTRIBUTION</b>	
Interest & Dividends	
Unemployment, Social Security	
HSA 1099	
<b>STOCK SALES:</b>	
<b>Need purchase and sales information; including dates, number of shares, purchase price and sales price</b>	
<b>GENERAL EXPENSES (UNREIMBURSED):</b>	<b>DOLLAR AMOUNTS - UNREIMBURSED</b>
Charitable Donations	
Job search expenses (travel for interviews, suit purchases, resume writing)	
Prior Year's Tax Preparation Costs	
Student Loan Interest	
Electronic purchases (new computer, IPAD, IPHONE, Kindle, GPS, etc) - PLEASE ITEMIZE	
Computer Supplies (flash drives, ink cartridges, security software, etc)	
Monthly Internet Cost	
Monthly Cell Phone Cost (any reimbursement from company?)	
Journals and periodicals (WSJ, NEWSPAPERS, MAGAZINES!)	
Books	
Luncheons and Retirement Parties	
Educational Costs	
Networking Events	
Unreimbursed office supplies	
Attache case, laptop bag	

Seminars, trade shows.	
Office decorations	
Business Gifts	
Job related overnight travel - how many nights?	
Luggage	
Licensing/certification fees	
Safety Deposit Box	
Investment Advisory Fees, IRA fees	
Certain legal fees	
Spotify, Hulu, Pandora, Netflix	
Linkedin Premium	
Amazon Prime	
<b>SALESPERSON JOB RELATED EXPENSES (UNREIMBURSED):</b>	<b>DOLLAR AMOUNTS - UNREIMBURSED</b>
Travel to clients that is not reimbursed (tolls, cabs, parking, zip car, uber, lyft - or mileage if you use personal auto)	
If you used your personal auto - Provide Odometer Reading beginning and end of the year, what kind of car did you use, how many were business miles, and are you reimbursed at all by the company?	
Meals and Entertainment	
<b>HOME OFFICE JOBS - must work almost exclusively from home:</b>	
Square footage of apartment	
% dedicated to office	
Monthly rent	
Monthly utilities	
Furniture purchased for office (desk, chairs, filing cabinet)	
<b>PROPERTY OWNERS:</b>	
Property Taxes	
Mortgage Interest	
Rental income and expenses for rental property	



