WROBLEWSKI & NEWSOM
CERTIFIED PUBLIC ACCOUNTANTS

New Client Intake – Personal

Client Information:

Taxpayer Name: ____

Spouse's Name (if applicable): ___________________________________

Taxpayer's SSN: ____________________ Job Title: ____________________

Date of Birth: ______________ Phone Number: ______________________

Email Address: ____

Spouse's SSN: _____________________ Job Title: ____________________

Date of Birth: ______________ Phone Number: ______________________

Email Address: ____

Home Address: ____

____

List States to File Tax Returns: ____________________________________

Dependent Information (if applicable):

Name: ________________________________ Date of Birth: ____________
SSN: ______________________

Name: ________________________________ Date of Birth: ____________
SSN: ______________________

Name: ________________________________ Date of Birth: ____________
SSN: ______________________

Refund Preference (Check One):

_____ Direct Deposit (see below)

_____ Check

If direct deposit is chosen above, please provide a voided check and fill in your bank information below:

Bank Name: ___________________________

Routing Number: _________________ Account Number: ________________

How do you prefer to receive a copy of the tax return we prepare (Check one or more):

_____ Digital via Client Portal

_____ Paper Copy (Additional Fees May Apply)

How do you prefer to sign your tax return:

_____ Electronic / Remote

_____ E-Mail (Print, Sign, Return)

_____ Ink on Paper

Drivers Licenses – Please provide a copy of the following:

_____ Taxpayer’s Drivers License

_____ Spouse’s Drivers License

Documents Needed to Prepare Your Return:

(This list is to help you gather information and may not be all-inclusive for your specific circumstances)

___ Copy of Prior Year Income Tax Returns (Federal, State and Local)
___ W-2/1099
___ Investment Account Statements
___ 1099-INT (Interest Income)
___ 1099-DIV (Dividend Income)
___ 1099-R (Retirement Income)
___ SSA-1099 (Social Security Income)
___ 1099-G (State and Local Tax Refunds, Unemployment Income)
___ Business Income, Expenses and Other Documents
___ Farm Income, Expenses and Other Documents
___ Rental Property Income, Expenses and Other Documents
___ K-1s
___ Closing Statements for Real Estate Purchases or Sales
___ 1099-NEC (Non-employee Compensation Income)
___ 1099-MISC (Miscellaneous Income)
___ Real Estate and Personal Property Taxes
___ 1098 (Mortgage Interest)
___ Charitable Contributions
___ Child Care Expenses
___ Energy Efficient Home Improvement Information
___ 1098-T (Tuition Statement)
___ 1098-E (Student Loan Interest Statement)
___ 1095-A (Medical Coverage)
___ Teacher Expenses
___ Active Military Expenses (Moving Expenses, etc.)
___ Alimony Paid or Received (Include Date of Divorce Agreement)
___ Expenses for Business Use of Home
___ Any Federal, State or Local Tax Notices