

# Ciarlette & Robbins LLP

Existing Client

Phone: 708-478-3840

www.ciarletteandrobbs.com

Taxpayer Name

*Has there been any change to your contact information?*

Phone Number

Email

Taxpayer

Spouse

Address

Street

City

State

Zip

*Provide current bank information. Per IRS, all refunds will be direct deposited for 2025 Tax Returns.*

Bank Account

Account #

Routing #

Did you want taxes paid through electronic funds withdrawal?

Yes / No

Can we use bank information provided for Tax Prep Fees?

Yes / No

*Amounts and date to withdraw will be confirmed prior to processing*

Has there been any change in dependents from last year?

☐ Have a child in the past year?

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

☐ Did a child graduate from college? Name: \_\_\_\_\_

Any documents that you will be receiving at a later date? (for example, K-1(s))

The following are common items you may have:

☐ Identity Protection PIN

☐ W-2(s)

☐ Social Security Statement

☐ 1099s (Int, Div, NEC, Misc, etc)

☐ Brokerage Statement(s)

☐ HSA Contributions and/or Distributions

☐ 1098s (Mortgage, Loan, Tuition)

☐ Real Estate Taxes

☐ K-1s

☐ Biz Income/Expenses for Sch C

☐ Rental Income & Expenses

☐ Charitable Contributions

☐ Child Care Statements

☐ K-12 Education Expenses

☐ College Savings Plan Contributions

☐ 1095 A/B/C - for Health Insurance

☐ Medical Expenses

☐ Estimated Tax Payment Records

What questions do you have for us, if any?

Tax Season Hours Begin February 2nd: M-Th 8:30am - 7:00pm, Fri 8:30am - 4:30pm and Sat 9:00am - 12:00pm

To access your electronic portal and securely send or receive files please follow the link below

<https://www.clientaccess.com/#/login>