

Ciarlette & Robbins LLP

New Client

Phone: 708-478-3840

www.ciarletteandrobins.com

	Name	Date of Birth	Social Security #
Taxpayer			
Spouse			
Dependent			
Dependent			
Dependent			

Contact Information - Please check preferred method of contact

	Phone Number	Email
Taxpayer	<input type="checkbox"/>	<input type="checkbox"/>
Spouse (optional)	<input type="checkbox"/>	<input type="checkbox"/>
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

Do you want a secure portal set up to electronically send and receive documents? Yes / No

Did you include all documents required to complete your tax return? Yes / No

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

The following are common items you may have:

- | | | |
|--|---|--|
| <input type="checkbox"/> Identity Protection PIN | <input type="checkbox"/> W-2(s) | <input type="checkbox"/> Last Tax Return Filed (required) |
| <input type="checkbox"/> 1099s (Int, Div, NEC, Misc, etc) | <input type="checkbox"/> Brokerage Statement(s) | <input type="checkbox"/> Social Security Statement |
| <input type="checkbox"/> 1098s (Mortgage, Loan, Tuition) | <input type="checkbox"/> Real Estate Taxes | <input type="checkbox"/> HSA Contributions and/or Distributions |
| <input type="checkbox"/> Biz Income/Expenses for Sch C | <input type="checkbox"/> Rental Income & Expenses | <input type="checkbox"/> K-1s |
| <input type="checkbox"/> Child Care Statements | <input type="checkbox"/> K-12 Education Expenses | <input type="checkbox"/> Charitable Contributions |
| <input type="checkbox"/> 1095 A/B/C - for Health Insurance | <input type="checkbox"/> Medical Expenses | <input type="checkbox"/> College Savings Plan Contributions |
| | | <input type="checkbox"/> Estimated Tax Payment Records |

What questions do you have for us, if any?

How did you hear about us?

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>

Individual tax returns begin at \$375, final price dependent upon complexity and volume of information