Ciarlette & Robbins LLP

2023 Existing Client Checklist

Has there been any change in dependents from last year? If so, please explain below

Has there been any change to your contact or bank information from last year? If so, please fill out below.

	Phone Number	Email
Taxpayer		
Spouse		

Address

Street City State Zip

Bank Account

Account # Routing #

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

If no, what documents are not included:

Please check all that apply to your tax return (These are common items required, it is not all inclusive):

- ☐ W-2(s)
- ☐ 1099-R Retirement Distributions
- ☐ Social Security Statement
- ☐ 1099 for Invest./Brokerage Accts
- ☐ 1099 - Interest & Dividends
- ☐ 1099-G for Unemployment
- ☐ 1095 A/B/C - for Health Insurance
- ☐ Estimated Tax Payment Records
- ☐ Medical Expenses
- ☐ 1099-NEC/1099-MISC
- ☐ Mortgage Interest
- ☐ Real Estate Taxes
- ☐ Biz Income/Expenses for Sch C
- ☐ Rental Income & Expenses
- ☐ K-1s
- ☐ 1098-E for Student Loan Interest
- ☐ Identity Protection PIN
- ☐ Real Estate Closing Statements
- ☐ HSA Contributions and/or Distributions
- ☐ 1098-T College Tuition
- ☐ 1099-Q College Savings Plan Distribution
- ☐ Charitable Contributions
- ☐ College Savings Plan Contributions
- ☐ Child Care Statements
- ☐ K-12 Education Expenses
- ☐ Home Office Expenses and Dimensions
- ☐ Energy Efficient Home Improvements

What questions do you have for us, if any?

We can be reached between the hours of 8:00am - 7:00pm at: 708-478-3840 or visit our website:
www.ciarletteandrobbins.com

To access your electronic portal and securely send or receive files please follow the link below
https://www.clientaxcess.com/#/login