# *Ciarlette & Robbins LLP*

*Existing Client*

Phone: 708-478-3840 www.ciarletteandrobbins.com

**Taxpayer Name** ______________________

**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 want taxes due paid through electronic funds withrawal?** Yes / No

**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:

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

**If no, what documents are not included:**

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**The following are common items you may have:**

☐ 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 for Current and Prior Tax Year
☐ 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?

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Tax Season Hours Begin February 3rd: M-Th 8:00am - 7:00pm, Fri 8:00am - 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.clientaxcess.com/#/login

***Please note, payment is due before your tax return is electronically filed***