

Ciarlette & Robbins LLP

2023 New Client Checklist

	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 _____

Bank Account _____
Account # _____ Routing # _____

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

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):

- | | | |
|--|---|---|
| <input type="checkbox"/> Last Tax Return Filed | <input type="checkbox"/> 1099 - NEC | <input type="checkbox"/> HSA Contributions and/or Distributions |
| <input type="checkbox"/> W-2(s) | <input type="checkbox"/> 1099 - Misc | <input type="checkbox"/> 1098 - T College Tuition |
| <input type="checkbox"/> 1099 - R Retirement Distributions | <input type="checkbox"/> Mortgage Interest | <input type="checkbox"/> 1099 - Q College Savings Plan Distribution |
| <input type="checkbox"/> Social Security Statement | <input type="checkbox"/> Real Estate Taxes | <input type="checkbox"/> W-2G Gambling Winnings and Losses |
| <input type="checkbox"/> Brokerage Statements | <input type="checkbox"/> Sch C Income & Expenses | <input type="checkbox"/> Charitable Contributions |
| <input type="checkbox"/> 1099 - Interest & Dividends | <input type="checkbox"/> Rental Income & Expenses | <input type="checkbox"/> College Savings Plan Contributions |
| <input type="checkbox"/> 1099 - G for Unemployment | <input type="checkbox"/> K-1's | <input type="checkbox"/> Child Care Statements |

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.clientaccess.com/#/login>