Ciarlette & Robbins LLP

New Client

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

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

Contact Information - Please check preferred method of contact

	Phone Number	Email
Taxpayer	☐	☐
Spouse (optional)	☐	☐

Address ____

Street City State Zip

Bank Account ____________________ ____________________

Account # Routing #

Did you want taxes due paid through electronic funds withdrawal? Yes / No

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:

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The following are common items you may have:

- ☐ Last Tax Return Filed
- ☐ W-2(s)
- ☐ 1099 - R Retirement Distributions
- ☐ Social Security Statement
- ☐ Brokerage Statements
- ☐ 1099 - Interest & Dividends
- ☐ 1099 - G for Unemployment
- ☐ 1099 - NEC/MISC
- ☐ Mortgage Interest
- ☐ Real Estate Taxes
- ☐ Sch C Income & Expenses
- ☐ Rental Income & Expenses
- ☐ K-1's
- ☐ 1095-A/B/C for Health Ins
- ☐ HSA Contributions and/or Distributions
- ☐ 1098 - T College Tuition
- ☐ 1099 - Q College Savings Plan Distribution
- ☐ W-2G Gambling Winnings and Losses
- ☐ Charitable Contributions
- ☐ College Savings Plan Contributions
- ☐ Child Care Statements

What questions do you have for us, if any?

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How did you hear about us? ______________________________

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
Individual Tax Returns begin at $350, price dependent upon complexity and volume of information