

CLIENT CHECKLIST PLEASE FILL OUT AND SIGN BELOW

Dear Client, we want to be sure to do the best job possible for you. So please take a moment to review your organizer or last year's tax return and be sure you provide the following information:

- Are all the names spelled correctly? _____
- Is each Social Security number correct (if possible, please enclose copy of each card) _____
- Are the dependents still correct (new baby, got married, not full time student, moved out) _____
- Please provide date of birth for each person _____
- Did you get married last year? _____
- Did you get divorced (or are you separated now)? _____
- Do you help support a parent? (possible dependent) _____
- Is this the mailing address you want on the tax returns or will you be moving soon? _____
- If you sold securities this year, please provide purchase date and costs (please attach list) _____
- Did you have a bankruptcy or foreclosure this year? _____
- Did you pay household employees \$1100 + this year (includes maid, babysitter, kid who mows the lawn and washed your car) _____
- Did you pay into your IRA/SEP? Do you plan to? _____
- Did you pay into your KEOGH? Do you plan to (until extension ends) _____
- Did you make Estimated Payments? If possible, please provide copies of all cancelled checks. _____
- Did you pay any prior year state (deductible) taxes? _____

- Do you have any gambling winnings (includes casinos, tracks, lotteries)

- Do you use airline miles for personal use?

- Did you get rebates or interest credits from use of credit cards?

- Did your boss reimburse you for mileage? Is it included in the W-2 or in a separate check?

- Do you get paid for equipment rental (entertainment industry)

- Did you get any insurance settlements?

- Did you collect unemployment?

- Did you collect State Disability?

- Get any money as gifts from family?

- Give any gifts of \$13,000 or more?

- Anything else that comes to mind?

I understand that I am responsible for providing my tax consultant with all the information necessary for filing a complete and correct return. I have not knowingly omitted any income nor satisfied any expenses. I will not hold my tax consultant liable for any omissions on my part. And I understand that if the returns are completed and then I remember additional things, I will be responsible for paying for revised or amended returns.

Print Name _____

Date _____

Signature _____