NEW CLIENT CHECKLIST

Name: ____
Tax year: ______________

How did you hear about us? ____
Have you used a tax professional before? ☐ Yes ☐ No

<u>In addition to your current year tax documents, please provide the following at your appointment:</u>

- ☐ Copies of last 2 years tax returns for both you and your spouse (federal, all states, local/city)
- ☐ Any amended tax returns from the past 2 years
- ☐ Copies of IRS, state or local notices/letters received last year
- ☐ Settlement sheets for homes sold/purchased
- ☐ Depreciation schedules (if applicable)
- ☐ Birth dates, SSN and full names of all your dependents

<u>Other items that may affect your current year taxes:</u>

- ☐ Yes ☐ No Do you have capital loss carryovers?
- ☐ Yes ☐ No Do you have net operating losses?
- ☐ Yes ☐ No Do you have old depreciation for a home office, etc.?
- ☐ Yes ☐ No Did you convert your personal residence to rental use, or vice versa?
- ☐ Yes ☐ No Do you have pre-1997 house sale gains that were rolled into a new home?
- ☐ Yes ☐ No Did you claim the new homebuyer credit of 2008 (which must be repaid over a 15-year period)?
- ☐ Yes ☐ No Have you ever made a contribution to an IRA that you couldn't deduct?
- ☐ Yes ☐ No Do you have unused solar, wind or geothermal energy credits from a prior year? Please provide a copy of your tax returns from these years if so.

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