



2017 NEW CLIENT INFORMATION WORKSHEET

Please provide the following materials:

- ◆ Completed Engagement Letter and Checklist
- ◆ All wage and income statements (W-2s and 1099s)
- ◆ ***New Clients - Include last year's federal and state income tax returns***

PERSONAL DATA

Last Name: _____	
First Name - Taxpayer _____	Occupation: _____
First Name - Spouse: _____	Occupation: _____
Address: _____	Apt # : _____
City: _____	State: _____ Zip: _____
Driver's License _____	Driver's License _____
Issue Date: _____ Exp. Date: _____	Issue Date: _____ Exp. Date: _____
Best Contact Phone: _____	Other Phone: _____
e-mail: _____ *	

EXEMPTIONS AND DEPENDENT DATA

Name	Social Security Number	Son, Daughter, Other Dependent	Date of Birth
Self		----	
Spouse		----	

We are required to have this form completed and signed as part of your income tax records. Please complete this form and bring it with you when you drop off your materials or meet with your tax preparer. It also helps insure that every deduction and credit is taken on your return.

YES	NO	Bring <u>all</u> W2s, 1099s for interest and dividends, mortgage interest and property tax records.
		Did everyone in your household have health insurance for all twelve months of 2017? If no, please provide details.
		If <u>you purchased</u> insurance you need to provide Form 1095-A, or Form 1095-B. If your employer provided insurance please provide Form 1095-C or W2 with DD in Box 12.
		If you are in a refund situation are you interested in having your monies deposited directly to your bank account? <u>Please provide a voided check.</u>
		Did you make Federal or State estimated tax payments for 2017? Provide dates and amounts for all payments.
		Provide a <u>detailed</u> summary of all cash and non-cash contributions. <u>Remember, you must provide a reasonable value for your non-cash contributions. Written proof is required for all donations.</u>
		Were there any births, adoptions, separations, divorces, marriages or deaths in your family during the tax year? We need a social security number for each dependent. Non-custodial parents must provide a signed Form 8332 to claim children as dependents.
		Did you own, buy or sell stocks and/or mutual funds? Provide all Form(s) 1099-DIV, 1099-B, 1099-INT provided by your investment company/bank.
		We will need a <u>mortgage statement</u> and <u>all property tax bills</u> paid and/or assessed on your home/homes for 2017.
		Did you operate a business or own rental property? Provide a summary of all income and expenses, including mileage. If you have interest in a partnership or Sub-S Corporation, provide all K-1's.
		Do you drive your car for work? Provide the make and model of your car. We need total miles driven, business miles driven and any reimbursements or allowance you receive.
		Did you pay Student Loan interest? Please provide interest statement Form(s) 1098-E.
		Did you pay college expenses for yourself or a dependent? Provide Form 1098-T for all students and institutions. Include any additional expenses paid that are not included on the form. Provide Form 1099-Q for 529 distributions.
		Did you pay child or dependent care expenses? Please provide the name; address, tax I.D. number of your care provider and the amount you paid for each dependent.
		Did you pay car, truck or boat license fees? Please provide the amounts paid.
		Did you own any type of IRAs? Did you contribute to an IRA for yourself or anyone else – e.g. Roth, Traditional, or 529 Savings Plan? If so, provide amounts and account type.
		Do you have a Health Savings Account (HSA)? We need the amount of contributions, the amount of distributions and we need you to verify distributions were for medical expense.
		Michigan - Did you purchase anything online that you did not pay Michigan sales tax? If so, please provide the amount for each purchase.

I (We), hereby declare that to the best of my (our) knowledge all income and deductions have been provided to the tax preparer of Yarmak & Co. and are true, correct and complete for the 2017 tax year.

Client Signature: _____

Date: _____

Client Signature: _____

Date: _____

