2018 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

Name-Taxpayer:	Occupation:
Name-Spouse:	Occupation:
Address:	Apt Number:
City:	State: Zip:
Driver's License:	Driver's License:
Issue Date:	Issue Date:
Expiration Date:	Expiration Date:
Best Contact Number:	Other Phone:
Email:	Email:
Bank Name, Routing, & Account Number:	

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 us.
<u>It also helps insure that every deduction and credit is taken on your return.</u>

Yes	No	**Please bring all W2s, 1099s for interest and dividends, mortgages interest and property tax records.**
		Do you want direct deposit of refunds, or auto withdrawal of taxes? Please provide current bank name, routing and account numbers.
		Did you pay Federal or State Estimated Payments? If so, please provide dates and amounts for all payments.
		Did everyone in your household have health insurance for all twelve months of 2018? If no, please provide details.
		If you purchased insurance you need to provide Form 1095-A. If your employer provided insurance please provide W2 with DD in Box 12.
		Do you have a Health Savings Account (HSA)? We need the amount of contributions, and Form 1099-SA for this deduction.
		Provide a detailed summary of all cash and non-cash contributions. Written proof is required. Remember to provide a reasonable value for non-cash contributions.
		Were there any births, adoptions, separations, divorces, marriages, or deaths in your family during this tax year? Please provide a social security 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.
		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 paid for each dependent.
		We will need a mortgage statement and all property tax bills paid and/or assessed on your home(s) for 2018. Did you pay car, truck, or boat license fees? Please provide.
		Please provide amount of personal injury protection (PIP) you paid with your auto insurance policy. You can contact your insurance provider for the information.
		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.
		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.
		Did you purchase anything online that you did not pay sales tax? If so, please provide the amount for each purchase.
		Did the IRS issue you or anyone in your household an Identity Protection PIN? Please provide the letter.

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 2018 tax year.

Client Signature: ______________________ **Date:** ______________

Client Signature: ______________________ **Date:** ______________