



2021 NEW CLIENT INFORMATION WORKSHEET

Please provide the following materials:

This **COMPLETED** form along with **ALL** income wage statements (W-2's and 1099's)

New Clients -- Include a copy of last year's Federal and State Income Tax Return(s)

PERSONAL DATA

Name of Taxpayer: _____
Occupation: _____
Current Address: _____
City: _____ Apt #: _____
State: _____ Zip: _____
Driver's License Number: _____
Issue Date: _____
Expiration Date: _____
Best Contact Number: _____
Current Email: _____
Bank Name: _____
Routing: _____
Account Number: _____

Name of Spouse: _____
Occupation: _____
Current Address: _____
City: _____ Apt #: _____
State: _____ Zip: _____
Driver's License Number: _____
Issue Date: _____
Expiration Date: _____
Best Contact Number: _____
Current Email: _____

Please note: 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, upload/email your documents or meet with us.

EXEMPTIONS AND DEPENDENT DATA

Name	Social Security Number	Relationship to you, Other Dependent	Date of Birth
Self -- Taxpayer			
Spouse			

Please complete other side of this form

NOTES	YES	NO	PLEASE BRING ALL W-2's, 1099s, INTEREST & DIVIDENDS, MORTGAGE(S) INTEREST AND PROPERTY TAX RECORDS
			Did you receive you "Stimulus Money"? We need IRS LETTER 6475 showing the amount received.
			Did you receive Advanced Child Tax Credit Payments? We need IRS LETTER 6419 showing the amount received.
			Do you want direct deposit of refunds or withdrawal of taxes due from your account provided? We will need the routing and account number for your account.
			Did you pay Federal or State Estimated Tax payments? If so, please provide dates and amounts for all payments made including payments made in January, 2022 for tax year 2021.
			Did the IRS issue you or anyone in your household an "Identity Protection PIN"? Please provide the IRS letter with the PIN.
			At any time during 2021, did you receive, sell, send, exchange or otherwise acquire any financial interest in virtual currency?
			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 & non-cash contributions. Written proof is required. Remember to provide a reasonable value for non-cash contributions.
			Any births, adoptions, separations, divorces, marriages or deaths in your family during the 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? Please provide all Form(s) 1099-DIV, 1099-B, 1099-INT that was provided by your investment company/bank.
			Did you pay Student Loan interest? Please provide interest Form(s) 1098-E.
			Did you pay for college expenses for yourself or a dependent? Please provide Form(s) 1098-T for all students and institutions. Include any expenses paid that are not included on the 1098-T. Please provide Form 1099-Q for 529 distributions.
			Did you pay or receive any child support and/or alimony during the tax year? Please provide amounts and copies of the divorce decree or certified agreement papers.
			Did you pay child or dependent care expenses? Please provide the name, address, tax ID number of your care provider and the amount paid for each dependent. Are childcare expenses reimbursed by your employer?
			Did you purchase and/or sell a home in 2021? If so, please provide the "settlement statement" for both the sale and the purchase.
			Do you own a home(s)? We will need a mortgage statement(s) and all property tax bills on your home(s) for 2021. If you rent, please provide the amount of rent you paid in 2021 along with your landlord name, address and tax ID number.
			Did you have gambling winnings in 2021? Please provide Form(s) W2-G and include the amount and proof of gambling losses.
			Did you buy and/or purchase renewal of a car, truck or boat license fees? Please provide.
			Did you own any type of IRA(s)? Did you contribute to an IRA for yourself or anyone else, i.e. Roth, Traditional or 529 College Savings Plan? If so, please provide amounts and account type.
			Did you operate a business or own rental property? Please provide a summary of all income and expenses. <i>Include mileage</i> . If you have interest in a partnership or Sub-S Corporation, please provide ALL K-1's.
			Did you purchase anything online that you did not pay sales tax? Is so, please provide the amount and date of each purchase.
			Do you want us to mail all of your "original" documents back to you via USPS - Priority Mail? If yes, the amount of \$25 will be added to your Invoice.

By signing below, I (We), hereby declare that to the best of my (our) knowledge, that all income and deductions have been provided to Yarmak & Co., CPA. The information provided is true, correct and complete for the 2021 tax year. I/(We) acknowledge receipt of the 2021 Individual Income Tax Return Engagement letter and agree to all its terms.

Client Signature: _____

Date: _____

Client Signature: _____

Date: _____