



GET'S TAX AND BOOKKEEPING SERVICES, INC

2020 NEW CLIENT INFORMATION FORM

Tax Payer Name: _____ Occupation _____

Spouse Name: _____ Occupation _____

Address: _____

City: _____ State: _____ Zip: _____

Home #: _____ Cell #: _____

Work #: _____ Email: _____

Tax Payer Social Security #: _____

Spouse Social Security #: _____

Tax Payer DOB: _____ Spouse DOB: _____

Please list all Dependents

Name	DOB	Social Security #:

Please check all that apply

_____ W-2/1099 INCOME	_____ Stock Sales	_____ Medical Expenses
_____ Self -Employed	_____ Purchase/Sale of Home	_____ Gambling Income
_____ Interest Income	_____ Current Home Owner	_____ Child Care Expenses
_____ Dividends Income	_____ Contributions	_____ Disability Income
_____ Rental Income	_____ Social Security Income	_____ Other Income
_____ Pension Income	_____ Early Retirement Distrib.	_____ Health Insurance
_____ Tuition (College)	_____ Student Loan Interest	_____ Unsure Tax Related



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*Guaranty Express
Tax Service*

TAX PREP CHECKLIST

(409)892-1118

Personal Information:

- A **Social Security, or tax ID, number & date of birth for everyone included on your tax return**
- Please provide a copy of last year's tax return if this is your first time filing with GETS's
- Did you make estimated tax payments – please provide dates and amounts
- Please provide direct deposit information – for both refund/payments to IRS

Income and Investment Information

- Form W-2 Wage and Tax Statement
- Bank or financial institution statements –
 - 1) Did you make contributions to an IRA? Form 5498.
 - 2) Are you paying down student loan debt? 1098-E.
 - 3) Did you take out a home mortgage? Form 1098 (Mortgage Interest Statement)
- Last year's state refund amount
- Other miscellaneous income records – May include award money, gambling winnings, lottery pay-outs, etc.
- Any (and all) Form 1099s – Different types of 1099:
 - 1) 1099-MISC if you are self-employed and received \$600+ from a client
 - 2) 1099-DIV if you received dividends
 - 3) 1099-G if you received money or benefits from the government
 - 4) 1099-K if you made third-party transactions (through PayPal or Square for example)
 - 5) 1099-R for distributions from a retirement plan, IRA, pension, annuity, etc.
 - 6) 1099-B sale of stock

Self-Employment and Business Records (when applicable)

- Business expense records
- Quarterly estimated tax payment receipts
- Mileage records
- Home office expenses -know how big your space is in square feet

Medical Expense Receipts and Records

- Receipts for unreimbursed medical expenses – These could include exams, surgeries, and preventative care. It could also be braces, glasses, hearing aids, prescriptions – even transportation to and from treatment.
- Form 1095: Proof of health insurance coverage
 - 1) Marketplace, you'll receive - 1095-A.
 - 2) Insurance providers will send - 1095-B
 - 3) Employer that offer coverage - 1095-C.
- Social Security benefits – SSA-1099



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Charitable Donations & Homeowners

- Charitable donation receipts
- Property tax receipts – If you itemize, you may be able to write off a portion of the property taxes you paid.
- Did you sale a home – primary or investment property – please send Hud statements for both purchase and sale

If you are in-doubt about whether an item is tax deductible or not please don't hesitate to call or email me to ask.