NUMBER QUEEN LTD

TAX + BUSINESS STRATEGY

New Client Checklist

- [ ] A copy of the last two year's Federal and State tax returns
- [ ] Each taxpayer and dependent's date of birth
- [ ] All statements of income such as:
  - [ ] W-2's
  - [ ] Interest and Dividend statements (Form 1099)
  - [ ] Pension income amounts, including Social Security
  - [ ] Individual Retirement Account contributions or withdrawals
  - [ ] Unemployment income statements
  - [ ] Trust, S-Corporation and/or Partnership income amounts (Form K-1)
- [ ] Amounts of Mortgage interest and points paid (Form 1098)
- [ ] Real Estate and Auto taxes paid
- [ ] Charitable donations (cash and non-cash)
- [ ] Forms 1095-A, 1095-B, and/or 1095-C (Health Insurance Statements)
- [ ] Out-of-pocket medical expenses
- [ ] Records of child care expenses – including amounts, payee, payee's EIN or Social Security number, payee's address.
- [ ] Amounts of any estimated tax payments
- [ ] Details of any capital gains transactions (such as a sale of home or stock)

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