

Client Check List

Office Use Only

___ Vehicle Tags

___ Driver's License

___ Eng Letter

Print Name _____

Did you receive stimulus check(s)?

Yes No

*If yes, please provide round 1 amount(s) _____

Round 2 amount(s) _____

Did you have more than \$10,000 in a foreign account at any point in 2020?

Yes No

*If yes, please provide transaction details for the tax year.

Did you have any virtual currency transactions?

Yes No

*If yes, please provide transaction details for the tax year.

Did you sell any real estate in 2020?

Yes No

*If yes, please provide closing documents (1099-S).

Marital Status Changes (as of 12/31/2020)?

Yes No

*If yes, please explain _____

Dependent Changes?

Yes No

*If yes, please explain _____

Address Changes?

Yes No

*If yes, please list _____

*County of Residence _____

*School District of Residence _____

*Public School Fees (School Sponsored Activities) _____

***Taxpayer Email Address:** _____

***Spouse Email Address:** _____

***Phone:** _____