Client Checklist

Client Information Package (4 pages, fillable PDF):

- Client Information Sheet (2 pages)
- Disclosure of Tax Return Information
- Use of Tax Return Information

Business Clients (Schedule C Worksheet)

- Doing Business As (DBA) Form
- All receipts for write offs
- Bank Statements
- Mileage Records

Documents:

- **Taxpayer & Spouse**
  - Valid Government ID (Driver License, State ID or Passport)
  - Social Security Card
  - Income Forms (W2s, 1099s, K-1, etc.)
  - College Student (1098-T)
  - Health Coverage (1095-A, 1095-B or 1095-C)
- **Dependents**
  - Valid Government ID (Driver License, State ID or Passport for 18+)
  - Social Security Card
  - Birth Certificate
  - School Report Card
  - Verification of Disability (letter from healthcare provider or social services program)
  - Income Forms (W2s, 1099s, K-1, etc.)
  - College Student (1098-T)
  - Health Coverage (1095-A, 1095-B or 1095-C)

Upload ALL documents to taxestogo™