New Client Checklist

Please bring all that is pertinent to your first appointment:

ALL CLIENTS

- ☐ Client Information Form **

TAX CLIENTS

Personal Data

- ☐ Copies of Social Security Cards (including spouse and children)
- ☐ Previous 3 Tax returns – personal and business

Employment & Income Data

- ☐ Current Paycheck stub
- ☐ Partnership and trust income info
- ☐ Pensions and annuities

BUSINESS CLIENTS

- ☐ QuickBooks Backup disk – email ahead or bring with you
- ☐ QuickBooks version and password
- ☐ FDOR Unemployment UCT#
- ☐ FEIN #
- ☐ S-Election if a Corporation
- ☐ Sales Tax certificate/number
- ☐ Bank Statements
- ☐ Auto loans and leases (account numbers and car value) if vehicle used for business
- ☐ IRS Power of Attorney **
- ☐ FDOR Power of Attorney **

IRS CLIENTS

- ☐ Previous 3 Tax returns – personal and business
- ☐ **ALL** IRS correspondence
- ☐ ALL documents pertaining to IRS issues
- ☐ IRS Power of Attorney **
- ☐ Client Information Form **

** **Available on our website www.gvc-financial.com**