

CLOPTON & COMPANY, LLC

Certified Public Accountants

NEW CLIENT INFORMATION

NAME(S): _____

TAXPAYER

SSN: _____
DOB: _____
E-MAIL: _____
CELL: _____
BUSINESS: _____
HOME: _____
ADDRESS: _____
ADDRESS: _____
CITY: _____
STATE: _____
ZIP: _____

SPOUSE

SSN: _____
DOB: _____
E-MAIL: _____
CELL: _____
BUSINESS: _____
HOME: _____
ADDRESS: _____
ADDRESS: _____
CITY: _____
STATE: _____
ZIP: _____

INFORMATION TO BRING FOR TAX PREPARATION

- COPY OF DRIVER'S LICENSE
- COPY OF LAST YEAR'S TAX RETURN
- FORMS W-2 & W-2G (GAMBLING INCOME & LOSSES)
- FORMS 1099 (INTEREST, DIVIDENDS, BROKERAGE ACCOUNTS)
- FORMS 1099-R (DISTRIBUTION FROM PENSIONS, IRAs)
- SOCIAL SECURITY, UNEMPLOYMENT, & OTHER INCOME
- ROYALTY, RENTAL, OR FARMING INCOME & EXPENSES
- K-1'S (INCOME/LOSS FROM PARTNERSHIPS, S CORPORATIONS, TRUSTS & ESTATES)
- FORMS 1098 (MORTGAGE INTEREST)
- PROPERTY TAX STATEMENT
- DOCUMENTATION FOR CONTRIBUTIONS OF \$250.00 OR MORE