

Creekside Income Tax

2151 Hess Road, Appleton, NY 14008

716-778-5120

New Client Information Form

What do I need to bring to my appointment?

- Bring a copy of last year's Federal & State return. We will review the returns for accuracy as well as verify that you have all the required information to complete this year's return.
- Bring social security cards for everyone listed on your tax return.
- Bring a driver's license for the taxpayer/spouse, this is required by both NYS and the IRS.
- If you qualify for Earned Income Credit bring proof of address for the children, such as a letter from the daycare, school or medical provider showing the child's name and address.
- Bring all your year end tax documents that you receive. That may include any of the following:

Income

- W2 – work income
- 1099 – other income (retirement, contract work, prizes etc)
- Self employment income *See below
- Interest income
- Dividend income
- Stock sale income & purchase price
- Alimony Received

Deductions

- Child care expenses, must be divided per child and include the provider's name, address and tax ID#
- Education expenses
- Alimony Paid

The following deductions still apply if the total is greater than the standard deduction. If in double, bring them and we will review.

- Mortgage interest paid
- Real Estate & School taxes paid
- Charitable contributions

Other

- Proof of health care coverage, Form 1095-A, 1095-B or 1095-C if received.

Tax Payers

Full Name _____ Date of Birth _____ Social Security Number _____ Disabled Yes/No _____

Spouses Full Name _____ Date of Birth _____ Social Security Number _____ Disabled Yes/No _____

Are you: married single legally separated

Dependents

Full Name _____ Date of Birth _____ Social Security Number _____ Relationship _____ Male/Female _____ Disabled Yes/No _____

If not married, do your children live with you? _____ How many months per year? _____

Is this per divorce agreement? _____

Earned Income Credit Only – Must have one of the following proof of residency for each child

- form 1095 school record medical record child care record social service statement other

Contact Information:

Address

Phone

Email Address

Bank Information for Direct Deposit

Bank Name

Routing #

Account #

Checking/Savings

Were you covered by health insurance all year?

Taxpayer Yes/No Insurance thru (circle one): employer / medicare / marketplace must have 1095-A

Spouse Yes/No Insurance thru (circle one): employer / medicare / marketplace must have 1095-A

Children Yes/No Insurance thru (circle one): employer / medicare / marketplace must have 1095-A

Comments on Health Insurance

Other questions required by the IRS or NYS

- Do you have a foreign bank account? Yes / No
- Homeowners, did you receive a property tax freeze credit check? Yes / No If yes, Amount?
- Did you purchase anything without paying the NY State tax? Yes / No If so how much did you spend?

NY State offers a credit for active volunteer firefighters/etm personnel. Are either the taxpayer or the spouse active volunteer fire personnel?

Taxpayer Yes/No

Spouse Yes/No

If so, Fire Company Name

Address