

MARK S VETA CPA & ASSOCIATES PC

Client Tax Preparation Data Form

Client's Name		Profession			
Birth Date / Incorp Date / S-Elect Date		SSN / EIN			
Address			Company		
City		State		Zip	
Work Phone			Fax		
Cell Phone			Home Phone		
Email	Marital Filing Status S MFS MFJ HOH				
Spouse's Name			Profession		
Birth Date			SSN		
Work Phone			Fax		
Cell Phone			Company		
Email					

Individual Only

Children	SS#	Date of Birth

Businesses Only

Shareholders/LLC Members	SS#	Ownership %

Attorney		Investment Advisor		
Bank		Referred By		

Items to bring to the initial meeting:

Individuals:

- Last 2 years tax returns.
- Settlement statement(s) on any real estate purchases, sales, re-finances in the last 2 years.
- Year to date pay stubs on jobs held at anytime during the current year.
- Any notices received from taxing authorities.

Businesses:

- Last 2 years tax returns.
- Balance sheet & income statement as of December 31 of the most recent year end.
- Year to date balance sheet & income statement.
- Any notices received from taxing authorities.