

First Time Customers

If we did not do your taxes last year, send the following:

1. Copies of Social Security Cards for adults and all dependents.
2. Write birthdates next to each Social Security Card copy.
3. Write the occupation (work title) for all adults next to SS Card Copy.
4. A copy of your Federal and State Tax Returns from last year.
5. Complete the “Cover Page” for all customers and include it in your package.
6. Complete the “Check-Off List for All Customers” and include in your package.