

COOK, SMITH & COMPANY CPA'S, LLC

Client Checklist

Tax Year 2024

PLEASE COMPLETE AND SUBMIT WITH YOUR TAX INFORMATION

Client Name(s) _____

Cell Number(s) Taxpayer: _____ Spouse: _____

Email _____

Did you move during 2024? If so, need the following:

Date Moved _____ New Address _____

Did you have any children that were born in 2024? If so, need the following:

Name _____ Date of Birth _____ SSN _____

Bank account for direct deposit of refund if different from last year:

Name of Bank _____ Routing # _____
Account # _____ Checking or Savings (Circle One)

Identity Protection Personal Identification Number (IP PIN) obtained from the IRS:

Taxpayer _____ Spouse _____
Children _____

Do you have any outstanding tax issues (Federal, State, or Local)? If so, briefly explain.

Delivery of Returns When Completed (Check One):

_____ Pick-up _____ U.S mail or delivery service

***** REMINDERS *****

- Tax appointments are limited to an as needed basis. Tax returns cannot be completed during a meeting.
- All tax documents must be submitted by March 22, 2025 for us to have time to complete by the deadline, if possible.
- If you renewed your driver's license in 2024, we will need to make a copy.
- Obtaining the IRS Identity Protection Personal Identification Number (IP PIN) to prevent tax identity theft.
 - The IRS issues a new IP PIN every calendar year.
 - If you have been in the program and receiving a letter every year with the IP PIN, you will continue to receive a letter.
 - If you have created an IRS online account in the past, you will need to log in to your account and retrieve that number.
 - If you are not in the program at all, we encourage you to do so at www.irs.gov and type in IP PIN in the search bar for instructions on how to complete the process.

THANK YOU FOR YOUR PATRONAGE.