

COOK, SMITH & COMPANY CPA'S, LLC

Client Checklist
Tax Year 2022

Client Name(s) _____

Cell Number(s) Taxpayer: _____ Spouse: _____

Email _____

Did you or your spouse renew your driver's license in 2022? If so, need a copy.

Did you move during 2022? If so, need the following:

Date Moved _____

New Address _____

Did you have any children that were born in 2022? If so, need the following:

Full Legal Name _____

Date of Birth _____

Social Security Number _____

Did you change banks? If so, need the following:

Name of Bank _____

Routing Number _____

Account Number _____

Checking or Savings (Circle One)

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

Taxpayer _____

Spouse _____

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

PLEASE RETURN THIS CHECKLIST WITH YOUR TAX DOCUMENTS. THANK YOU.