

# COOK, SMITH & COMPANY CPA'S, LLC

## Client Checklist

Tax Year 2023

**PLEASE COMPLETE AND SUBMIT WITH YOUR TAX INFORMATION**

Client Name(s) \_\_\_\_\_

Cell Number(s) Taxpayer: \_\_\_\_\_ Spouse: \_\_\_\_\_

Email \_\_\_\_\_

Did you move during 2023? If so, need the following:

Date Moved \_\_\_\_\_ New Address \_\_\_\_\_  
\_\_\_\_\_

Did you have any children that were born in 2023? 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 April 1 for us to have time to complete by the deadline, if possible.
- If you renewed your driver's license in 2023, 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 into 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](http://www.irs.gov) and type in IP PIN in the search bar for instructions on how to complete the process.

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**THANK YOU FOR YOUR PATRONAGE.**