

Peterson & Jake CPA, Inc.

P.O. Box 94
Port Orchard, WA 98366
Tel: (360) 874-0404
Fax: 9360 0 876-1998

Client Information List

Individuals:

1. Name – (Please also see New Client Information form)
2. Phone numbers - (Please also see New Client Information form)
3. Bring:
 - A copy of your last year's tax return, if not prepared by this office
 - Birthdates
 - Social security numbers
 - Property tax statement
 - Social Security, Unemployment, Alimony & Other Income
 - Form(s) W-2 & W-2G (gambling income & losses)
 - Form(s) 1099 (interest, dividends, stock, etc.) money's received
 - Form(s) 1099-R (distribution pension, IRA, etc.)
 - K-1's (income/loss from partnerships, S corporations, etc.)
 - Brokerage statements from stock, bond or other investment transactions
 - Form(s) 1099-K (Merchant Card and Third Party Network Payments)
 - Form(s) 1099-A or 1099-C from Abandonment or Cancellation of Debt
 - Royalty, Rental or Farming Income
 - Form(s) 1098's (mortgage interest)
 - Contributions with documentation
 - Copy of current Drivers License

Companies:

1. Name of Company & Contact names
2. Phone numbers
3. Articles of Incorporation, Business Organization Paperwork, & Stock Certificates
4. Bring:
 - A copy of your last year's tax return, if not prepared by this office
 - Dec 31st bank statements
 - Full year – copies of 941s, SUTA, L&I, B&O
 - Back up of QuickBooks or bookkeeping file
 - Dec 31st loan and/or credit card statements
 - Loan paperwork on new purchases or loans
 - Health Insurance information