

# **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
2. Phone numbers
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

### **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