Please Confirm Your Appt at Your Earliest Opportunity. Call (916) 236-1040 Opt 1 for Matt/Asst; Opt 2 for Teriza
Or fax (916) 236-1041 or general email at Tax@CTA1040.com

Client(s):

(Pre-Scheduled) APPOINTMENT:______________ Primary Contact Info: ___________________________________

COMPLETE TAX ADVANTAGE

Please Complete Checklist Below, Signed Engagement Letter and Fax Both to Us With Any Questions

- Please submit your information/tax organizer at least ONE WEEK prior to your appointment
- Please sign and return our Engagement Letter with your submitted information
- Last 2 years' income tax return if you are a *new* client
- Name, address, SSN & date of Birth for yourself, spouse and dependents if not on file
- Dependent Care Provider, Name, Address, Tax ID and S.S.N. if not on file
- EITC, Child Tax Credit or AOTC Recipients: Please call for substantiation requirements
- Banking information if Direct Deposit or Auto Pay desired

Income Data Required –

Please check all that apply to you prior to faxing to us:

- ☐ W-2 Wages and/or 1099 Unemployment
- ☐ 1099-Int Interest / 1099-Div Dividend Income
- ☐ 1099G State/Local Income Tax Refund
- ☐ 1099-Misc Other Income (Self Emp/Barter)
- ☐ 1099-R Pension Distributions & Rollovers
- ☐ Form 1095 Health Insurance Coverage
- ☐ 1099-B Stock or Bond Sales
- ☐ Contract/Partnership 1065 K-1
- ☐ Trust/Estate Income 1041 K-1
- ☐ W-2G Gambling/Lottery Winnings Losses/Prizes/Bonus
- ☐ Alimony Income & Payer Information
- ☐ Rental Income
- ☐ Tips Not Reported to Employer
- ☐ Foreign Account Information & Income Earned
- ☐ New/Used Business Equipment Purchases Including Auto
- ☐ Proceeds from Asset Sale or Business Equipment
- ☐ Social Assistance Income
- ☐ Other_______________________________

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Sacramento, CA 95822

Expense Data Required –

Please check all that apply to you prior to faxing to us:

- ☐ Dependent Proof of Residency/Health Coverage
- ☐ Dependent Care Costs, Provider Name, Address, EIN, Phone if new
- ☐ Form 1098-T Education/Tuition Costs & Materials Purchased
- ☐ Form 1099-SA Medical HSA
- ☐ Form 1098 Mortgage/Equity Loan Interest
- ☐ Employment Related Expenses
- ☐ Gambling Expenses (Casino 'In-Out' Statement)
- ☐ Tax Return Preparation Expenses
- ☐ Investment Expenses
- ☐ Real Estate Taxes
- ☐ Estimated Tax Payments & Dates Paid
- ☐ Bus Use of Home Expenses
- ☐ Charitable Contributions Cash/Non-Cash
- ☐ Purchase Qualifying for Residential Energy Credit
- ☐ Form 5498 IRA/Retirement Contributions
- ☐ Home Purchase or Refi Closing Statement
- ☐ Moving Expenses
- ☐ Other: ______________________________

Thank you!
We Appreciate Your Business!