New Client Tax Return Check List:

* Copy of Tax Return last filed
* Copy of original Social Security Card for anyone on the return
* Copy of Driver's License for anyone on the return
* Birth Certificate for any children on the return, along with proof of address for child (such as school records, doctor's notes)
* If any dependents are full time students at a college/university: Form 1098-T
* Income received 2021 such as W2s, 1099s Forms:  
  If you're a self-contractor: Form 1099-NEC  
  If you've received social security benefits: Form SSA-1099

If you’ve received interest income: Form 1099-INT

If you’ve received distribution of retirement benefits such as pensions and annuities: Form 1099-R

If you sell stocks, bonds, derivatives or other securities: Form 1099-B (to report gains/losses)  
If you've received unemployment: Form 1099-G\*  
*\*In NJ, you can retrieve Form 1099-G from* [*www.myunemployment.nj.gov*](http://www.myunemployment.nj.gov)

* If you have a mortgage, Form 1098: Mortgage Interest Statement    
  If mortgage has been paid off, copy of Real Estate Taxes paid
* If you’ve contributed to an IRA Account: Form 5498
* If you have had Health Insurance Coverage: Form 1095 A, B or C
* **Please inform us if you have invested in cryptocurrency**
* Bank account information for account & routing number

**When ready, please drop off or mail to:**  
Andrew Sarabia Consulting

1 University Plaza, Suite 614

Hackensack NJ 07601

**Upload to Client Portal**

**Fax to 201-487-8850**

Or

**You may also forward this information to Andrew directly via email:**

**ANDREW.SARABIA@GMAIL.COM**

*In one email, Include your full name along with contact information, attachments & questions you might have for Andrew. Please note, if you are sending any files to Andrew via e-mail we would prefer them to be in PDF format or a scanned copy for a clear image.*

Thanks in advance. If you have any further questions, do not hesitate to contact our office at the number below.

Thank you.