

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
- 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.