



## New Client Checklist

Every tax situation is different, therefore, what is needed to file will vary. For your convenience, we have compiled a checklist to assist with the most common information necessary to file your tax return. Gathering this data ahead of time will ensure a seamless appointment. It will also help our staff provide speedy and accurate service. Please feel free to call if you have any questions.

As always, your business is greatly appreciated. We look forward to working with you this upcoming tax season!

Please include all necessary documents:

- Valid Driver's License or ID*
- Social Security Card (yourself and dependents)*
- Proof of Income (W2, 1099)*
- Receipts*
- Prior Year Tax Return*
- Proof of Residency (Utility Bill, Lease, Rent Receipts)*
- Proof of Relationship (Shot/Medical Records, Birth Certificate, Report Card)*
- Letter 6475 Economic Impact Payments (EIP)*
- Letter 6419 Advance Child Tax Credit Payments*
- Childcare/Dependent Care Expenses*
- Student/Educational Expenses (1098-T, 1098-E, Receipts)*
- Identity Protection PIN (if one has been provided to you by the IRS)*
- Bank Routing and Account Numbers for Direct Deposit*

RiJoyce T&B Solutions LLC Provides Quality Tax Preparation, Accounting and Financial Planning Services to meet your individual and business needs!

Latesha Wallace, RiJoyce T&B Solutions LLC

DBA: RiJoyce Tax

Email: [info@rijoycetbs.com](mailto:info@rijoycetbs.com)

Office/Cell: (214) 866-5485