

Contact Info Worksheet

Please use this worksheet to give us basic contact information for preparation of your tax returns. You do not need to complete this each year; only complete if you are new to the Watson CPA Group (yay!) or if there are changes. Also, you do not need to provide information if we can find it elsewhere such as SSNs or banking information. Shockingly, your date of birth is not usually displayed on a tax return.

Please download, open in Adobe, complete and securely upload the PDF to your client portal. Please do not email this worksheet since it contains sensitive information. You can access your client portal here-

www.watsoncpagroup.com/portal

Caution: many browsers will give you the warm fuzzy that your information is being saved however when we receive it, the PDF is blank. As such, please download first and then open with Adobe, rather than using your browser.

Worksheets Available

Here is a list of our worksheets. As mentioned before, you do not have to replicate data that is available elsewhere. For example, mortgage interest and real estate taxes reported on Form 1098 do not need to be entered again with our worksheets. Let's keep life simple and easy for you; that's why you hired us.

Contact Info (this one)	Used for basic contact information	www.wcgurl.com/60
Dependents	Used for dependents and dependent care	www.wcgurl.com/61
Education	Used for education expenses, student loans, 529	www.wcgurl.com/62
Deductions	Used for moving, medical, local taxes, home, charity, IRA	www.wcgurl.com/63
Small Business	Used for LLCs and S Corps to report income and expenses	www.wcgurl.com/64
Rental Property	Used for rental property income and expenses	www.wcgurl.com/65
Auto Expenses	Used for actual expenses and mileage information	www.wcgurl.com/66
Home Office	Used for home office deductions	www.wcgurl.com/67
Property Sale	Used for reporting real estate sales, home and rental	www.wcgurl.com/68
ExPat	Used for expatriates to report foreign income, dates	www.wcgurl.com/69
Annual Questionnaire*	Used for tax questions including retirement contributions	www.wcgurl.com/70

* Everyone is strongly encouraged to review the annual questionnaire. As tax laws change from year to year, we need to ask questions to ensure you are getting the most out of your tax returns.

Taxpayer

Legal Name _____ Occupation _____

Social Security Number _____ Date of Birth _____

Cell Phone _____ Work Phone _____

Primary Email _____

Secondary Email _____

Drivers' License Number* _____ Issuing State _____

Issued Date _____ Expiration Date _____

Spouse

Legal Name _____ Occupation _____

Social Security Number _____ Date of Birth _____

Cell Phone _____ Work Phone _____

Primary Email _____

Secondary Email _____

Drivers' License Number* _____ Issuing State _____

Issued Date _____ Expiration Date _____

Address

IRS Mailing Address _____

Physical Address _____

Banking

Name of Bank _____ Account Type _____

Routing Number _____ Account Number _____

* Drivers' license information is needed by the IRS and most states to reduce identify theft and the amount of fraudulent tax returns being filed.

Tax Year _____ Date Worksheet Completed _____

Is this an update to a previously submitted worksheet? Yes No

Disclosure

I(We) verify that the information provided in this **Contact Info Worksheet** is accurate and complete. I(We) understand it is my(our) responsibility to include any and all information concerning income, deductions and other information necessary for the preparation of my (our) tax returns.

Taxpayer Signature _____ Date_____

Printed Name _____

Spouse Signature _____ Date_____

Printed Name _____

Please call or email us anytime with your questions and concerns. Seriously! You can call us and we can complete this for you over the phone, talk about the weather and share vacation ideas.

Thank you in advance, and we look forward to working with you!

The Watson CPA Group