Jeffrey B. Smith, CPA, P.A.
Certified Public Accountants and Consultants

PO Box 91416, Raleigh, NC 27675-1416
(919) 414-5577
jeff@jbsmithcpa.com

New Client Information

Tell us about you and what you need. Jeff will review this before your first meeting.

Please note: Do not write Social Security or bank account numbers here. Jeff collects those securely through the portal.

About you

Full legal name

Spouse's full name (if filing jointly)

Street address

City, state and ZIP

Phone

Email

Preferred contact

Filing status last year

Occupation

Number of dependents

How we can help

Services needed

- ☐ Individual tax return
- ☐ Business tax return
- ☐ IRS or state notice
- ☐ Tax planning
- ☐ Bookkeeping or payroll
- ☐ Estate or trust return

Anything Jeff should know before you meet?

How did you hear about us?

Signature

Date

Return this form through your secure client portal at jbsmithcpa.sharefile.com or bring it to your appointment. Please do not email it.

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Tax Document Checklist

Check off each item as you gather it, then upload your documents to the client portal.

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Your name

Income

- [ ] W-2 from each employer
- [ ] 1099-INT (interest)
- [ ] 1099-B (investment sales)
- [ ] SSA-1099 (Social Security)
- [ ] K-1 from partnerships, S corps or trusts
- [ ] Rental income and expense summary
- [ ] 1099-NEC or 1099-MISC
- [ ] 1099-DIV (dividends)
- [ ] 1099-R (retirement distributions)
- [ ] 1099-G (unemployment or state refund)
- [ ] 1099-K from payment apps or marketplaces
- [ ] Business income and expense summary

Deductions and credits

- [ ] 1098 mortgage interest statement
- [ ] Charitable donation receipts
- [ ] 1098-T tuition statement
- [ ] Child care provider name, address, tax ID
- [ ] Property tax bills
- [ ] Medical and dental expenses
- [ ] 1098-E student loan interest
- [ ] HSA forms 5498-SA and 1099-SA

Other documents

- [ ] Estimated tax payments made, with dates
- [ ] Last year's return (new clients)
- [ ] Refund bank details (provide via portal only)
- [ ] 1095-A if you had Marketplace insurance
- [ ] Any IRS or North Carolina letters

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Business Client Questionnaire

A few basics about your business so Jeff can prepare a quote.

The business

Business name

Owner name(s)

Entity type

Year started

Industry or type of work

Number of employees

Accounting software

Year-end

Services

What do you need help with?

- ☐ Business tax return
- ☐ Bookkeeping
- ☐ Payroll
- ☐ Sales tax
- ☐ Tax planning
- ☐ Entity choice or S corporation election
- ☐ Financial statements for a lender
- ☐ Buying or selling a business

Notes

Signature

Date

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