gurneeCPA.com, LLC
847-263-0303

Required Information for 1040 Preparation

Client Name(s) _____ **Date:** _____

Dear Valued Client:

Please provide the information we require to prepare your tax returns. You can help us expedite the preparation of your returns by returning this sheet and the documents we require so that we do not have to call you for the information. Please provide details to all questions answered "yes."

How would you like us to provide you with a copy of your tax return?

- ☐ Send you an email with a link to the tax returns stored in our secure files
- ☐ Print a paper copy of the tax returns

Bank Account:

The IRS requires us to verify your bank account each year. Please provide the following information on the account you want us to use to deposit a refund or debit your account for a balance due.

- ☐ Name of bank or financial institution
- ☐ Routing number - Nine digits
- ☐ Account number
- ☐ Name(s) on account: _____

If you have an overpayment on your tax returns, how would you like to receive it?

- ☐ Deposit the refund to the above listed bank account
- ☐ Request the refund be paid by check
- ☐ Apply my refund to next year's tax liability

If you have a balance due, how do you want to pay it?

- ☐ Debit the above listed bank account
- ☐ I/We will mail a check.
- ☐ Please debit next year's estimated tax payments from my bank account.

Other Information We Require:

- ☐ Copy of driver's licenses attached
- ☐ Signed engagement letter attached

	Yes	No
Foreign Accounts or Assets:		
Do you or your spouse have signature authority or are named as a co-owner on a bank account in a foreign country even if the funds are not yours?		
Did you receive an inheritance from someone in a foreign country?		
Did you or your spouse have a foreign bank account with a balance of $10,000 at any time during the year?		
Did you or your spouse receive a distribution from, or were the grantor or transferor to a foreign trust?		
Did you or your spouse hold an interest in a foreign financial asset?		
Other Questions:		
Did you or your spouse make a gift of money or property to any individual in excess of $15,000 or $30,000 for joint gifts by a married couple?		
Do you have any unpaid sales or use tax for purchases made in 2019? If yes, provide the amount that you purchased: $ _____		