



Tax Client Data Request

Date: _____

Name: _____

Please complete and return to our office:
 Scan and Upload Documents to SmartVault
 Email: Office@SRQTax.com
 Mail or Drop off: 2906 Bee Ridge Road, Sarasota, FL 34239

Please provide the following information for Set Up:

FOR INDIVIDUAL TAX CLIENTS

YES NO N/A

- Three most recent individual Income Tax Returns.
- Copies of Taxpayer and Spouse Driver's Licenses
- Dates of birth for any dependents claimed on your tax return

FOR BUSINESS TAX CLIENTS

YES NO N/A

- Three most recent business Income Tax returns.
- Payroll Returns: Prior year and year-to-date. Including Forms 941, RT-6, 940, W2/W3
- Sales Tax Return: Prior year and year to date, returns for all months/quarters.
- Year-end Income Statement and Balance Sheet.
- If you use QuickBooks Online: Provide Accountant's access to file.
Send invitation to: LEA@SRQTAX.COM
- If you use QuickBooks Desktop: Provide An Accountant's Copy, Backup or Portable Company File.
- If we will be providing bookkeeping services: Provide **VIEW ONLY** access to all business bank and credit card accounts.
USE OFFICE@SRQTAX.COM FOR ALL INVITATIONS
- If you utilize a POS System or Webstore/Shopping Cart, please provide login credentials
- Other: _____
- Other: _____

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|----------------------|------------------------|
| | Office Use Only |
| Date Received | |
| Received by | |