

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 WCG (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.

There are two versions of this worksheet; a **non-fillable PDF** (what you are viewing now) and an online digital form. If you feel like safely and securely submitting this information via our website, please use this redirect link-

wcginc.com/610

If you want to use the non-fillable PDF, please download, complete and securely upload the PDF to your Sharefile. Please do not email this worksheet since it contains sensitive information. You can access Sharefile here-

wcginc.com/sharefile

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	wcginc.com/610
Dependents	Used for dependents and dependent care	wcginc.com/612
Deductions	Used for moving, medical, local taxes, home, charity, IRA	wcginc.com/615
Education	Used for education expenses, student loans, 529	wcginc.com/617
Business Set Up	Used for all businesses to detail set up information	wcginc.com/620
Business Ops, Fin. Data	Used for all businesses to report income and expenses	wcginc.com/621
Home Office	Used for home office deductions	wcginc.com/623
Auto Expenses	Used for actual expenses and mileage information	wcginc.com/625
Accountable Plan	Used for business owners to reimburse for mixed use expenses	wcginc.com/628
Rental Property	Used for rental property income and expenses	wcginc.com/630
Property Sale	Used for reporting real estate sales, home and rental	wcginc.com/637
Expat	Used for expatriates to report foreign income, dates	wcginc.com/640
Annual Questionnaire	Used for tax questions including retirement contributions	wcginc.com/690

Taxpayer

Legal Name _____ Occupation _____

Social Security Number _____ Date of Birth _____

Cell Phone _____ Work Phone _____

Primary Email _____

Secondary Email _____

Driver's license information is now required to electronically file your tax returns. If this information is not provided with your tax returns, some states might withhold tax refunds for several weeks while they process a secondary review (yuck).

Drivers' License Number* _____ Issuing State _____

Issued Date _____ Expiration Date _____

NY State Document No.* _____

* This is an 8-10 digit combination of letters and numbers and is usually on the bottom right hand corner of the back of the license.

Spouse (if applicable)

If you are not married, then you can skip this section. However, if you are married and intend to file "married filing separately" we need this information.

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 _____

NY State Document No.* _____

IRS Mailing Address

Street Address _____

City, State and Zip _____

Country (if not USA) _____

Physical Address (if different than mailing address)

Street Address _____

City, State and Zip _____

Country (if not USA) _____

Banking

Name of Bank _____ Account Type _____

Routing Number _____ Account Number _____

Names on the Account _____

Submission

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!

WCG CPAs & Advisors