Luis Crespo, M.B.A. T: 713-737-9000 / lcresfel@gmail.com

Crespo Business & Tax Solutions LLC

**Client Information**

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| --- | --- | --- | --- | --- |
| **TAXPAYER INFORMATION** | | | | |
| **Name :** | | **Date of Birth :** | |  |
| **Phone :** | | **Email :** | | |
| **Occupation :** | | | | |
|  | **Date Issued :** | | **Expiration Date :** | |

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| **Spouse Information** | | | | |
| **Name :** | | **Date of Birth :** | | **.** |
| **Phone :** | | **Email :** | | |
| **Occupation :** | | | | |
| **License #** | **Date Issued :** | | **Expiration Date :** | |

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| **Dependents** | | | |  |
| **Name** |  | **Date of Birth** | **Relation** | **Month live with you** |
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| **Documents required (**if apply) | |
| W2 Forms | Prior Year Tax return (New Clients) |
| 1099-DIV : Dividend Income | 1099-G : Government payments |
| 1099-R : Retirement | 1099-Misc : Miscellaneous Income |
| 1099-SSA : Social Security Benefit | 1098 : Mortgage Interest |
| 1095-C : Employer Provided Health Insurance | 1098-E : Student Loan Interest Statement |
| 1099-INT : Interest Income | Property Tax Statements |
| Income & Expenses of Business |  |