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

Crespo Business & Tax Solutions LLC

**Client Information**

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

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

|  |  |
| --- | --- |
| **Dependents** |  |
| **Name** |  | **Date of Birth** | **Relation** | **Month live with you** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

|  |
| --- |
| **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 |  |