



KRISTEN *J.* HOOKER
TAX SERVICES

New Client Checklist

Please plan on bringing in or uploading the following information:

- Last year's tax return
- Copy of driver's license (both if married)
- Social Security numbers of everyone listed on the return (if not on last year's tax return)
- Birthdates of everyone that will be listed on your return
- New address, if different from last year
- Bank account information if you would like a direct deposit (Bank name, routing number and account number)
- Alert us if you are an owner of a foreign bank account or of virtual currency, such as bitcoin
- All tax 2022 tax documents (refer to the tax preparation checklist, if necessary)