FRANCISCO CHUA PATAWARAN & ASSOC., LLC
Tax Preparation & Consulting
5 OAK HILL DR., WAYNE, NJ 07470
TEL: 973-633-1882 || FAX: 973-633-1883 || EMAIL: FCPTAX@AOL.COM || WEB: WWW.FCPTAX.COM

Client Instructions

Send Us Your Tax Documents:

- Send us your tax documents at least 1 WEEK IN ADVANCE if you are scheduled for a mailing/phone appointment. Otherwise, we may need to reschedule your appointment.
- For in person appointments, allow 30 minutes for data entry and the initial interview followed by 30 minutes to finalize your return with Francisco C. Patawaran. Wait times may be extended if a client forgets any necessary documents. So please be courteous to others and make sure you have all your documents in order for your appointment.
- Subject line for emails: **LAST NAME, FIRST NAME: Appt. Date + Time**
- Tax documents can be attached to the email or a link given to your shared folder. We suggest using dropbox or google drive (for google drive only, grant access to fcpatawaran@gmail.com but please note that email account is not monitored. It is used solely for google drive documents. Any questions or correspondence should be sent to fcptax@aol.com)
- Mailed documents: please make sure to send us only photocopies of your tax documents in the event the mail gets lost.
- Faxed documents: please number each page (example: 1/3, 2/3, 3/3) in case a page goes missing or is unclear and needs to be resent.

New Clients Documents Needed:

- ☐ New Client Questionnaire (fill out, save, then email it to us)
- ☐ Last year's tax return (IMPORTANT! We need to get an accurate history of your previous tax filings. This includes federal and state returns to see any amounts owed or refunds received.)
- ☐ Social security cards for all taxpayers and dependents
- ☐ Birth certificates for all dependents
- ☐ Photo IDs for all taxpayers
- ☐ Checkbook

New & Current Clients Documents Needed if applicable:

- ☐ New Client Questionnaire (fill out, save, then email it to us. Current clients: only send to us if your contact information has changed.)
- ☐ Current government issued photo identification for all taxpayers.
- ☐ Social security card and birth certificate for any new dependents.
- ☐ Form W2
- ☐ Form 1099-NEC Nonemployee Compensation
- ☐ Form 1099-MISC Miscellaneous Income
- ☐ Form W-2G Gambling Winnings
- ☐ Form SSA-1099 Social Security Benefit Statement
- ☐ Form 1099-G Certain Government Payments such as unemployment income, family leave, or state tax refunds
- ☐ Form 1099-C Cancellation of Debt
- ☐ Form 1099-B Proceeds from Broker and Barter Exchange Transactions
- ☐ Closing Disclosure for home and rental property BOUGHT and SOLD
- ☐ Form 1095-A Health Insurance Through the Marketplace
- ☐ Rental Property Tracking Worksheet
- ☐ Small Business Tracking Worksheet
- ☐ Form 1099-S Proceeds from Real Estate Transactions
- ☐ Form 1099-R Distributions from pensions, annuities, retirement, or profit-sharing plans, IRAs, insurance contracts, etc.
- ☐ Form 1098-T college tuition payments
- ☐ Quarterly estimated tax payments made to federal and state
- ☐ Gambling losses (applicable only to off-set gambling winnings)
- ☐ Child care expenses (we need the name, address, and federal ID)
- ☐ Medical and dental expenses