Welcome to WYZE Tax Services!

To ensure a smooth and efficient process, we kindly ask all new clients to provide the following information and documents. This will help us get a comprehensive understanding of your tax situation and better serve you.

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1. Past 3 Years of Tax Returns

- If you have filed taxes for the past three years, please bring copies of those returns. These will help us identify any potential carryovers or opportunities for amendments.

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2. Photo Identification

- **For you and your spouse (if applicable):**
  A clear copy of a valid **Driver's License** or other government-issued photo ID. This is required for identity verification and compliance with federal regulations.

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3. Income Sources

- Please provide details about **all sources of income**. This includes:
  - Employment (W-2 forms)
  - Self-employment or freelance work (1099 forms, etc.)
  - Investments (dividends, interest, stock sales)
  - Rental property income
  - Retirement income (pensions, Social Security, etc.)
  - Any other forms of income (e.g., alimony, royalties)

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4. Life Changes

- Let us know if there have been any significant **life events** that could affect your taxes, such as:
  - Getting married or divorced
  - Having or adopting a child
  - Buying or selling a home
  - Starting a business or changing jobs
  - Receiving an inheritance
  - Moving to a new state or city

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5. Contact Information

- Make sure to provide up-to-date details for **you and your spouse (if applicable):**
  - Full Name(s)
  - Address
  - Email Address
  - Phone Number(s)
  - Any preferred method of contact

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6. Dependent Information

- If you are claiming dependents, we'll need:
  - **Full names, Social Security Numbers (SSNs), and Dates of Birth (DOBs)** for each dependent.

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7. Additional Tax Documents

- Bring any relevant tax-related paperwork, including but not limited to:
  - W-2, 1099, and K-1 forms
  - Records of deductible expenses (e.g., medical, education, or charitable donations)
  - Mortgage interest statements
  - Property tax bills
  - Student loan interest statements
  - Health insurance coverage forms (e.g., 1095-A, 1095-B, or 1095-C)
  - Documents related to any tax credits or deductions you plan to claim