

# M&T PROFESSIONAL TAX SERVICES LLC - 2021 Client Data Sheet

We MUST see Photo IDs.

Primary name (as shown on Social Security Card):				Spouse name (as shown on Social Security Card):			
SSN:		Date of Birth		SSN:		Date of Birth	
Driver's License Yes / No	State	Issue Date	Expire Date	Driver's License Yes / No	State	Issue Date	Expire Date
Email Address:				Email Address:			
Occupation:				Occupation:			
Can anyone claim you as a dependent? Yes / No				Can anyone claim you as a dependent? Yes / No			
Were you married as of 12/31/2021? Yes / No							
If married, live together? Yes / No				If no, when did you separate ? (MM/DD/YYYY):     /     /			
Address:				City:		State:	Zip Code:
Phone (Day):				Phone (Spouse if any):			

Dependent Name (First, Middle Initial, Last) As shown on Social Security card	Date of Birth (MM/DD/YYYY)	S S or ITIN# Number	Received Child Credit		Relationship To Taxpayer	# of Months Lived in home
			Months	Amount		
1.						
2.						
3.						
4.						

Can anyone else claim the dependent(s) listed above? Yes / No

How many of each of the following Income statements/types do you have for 2021?

Type	#	Type	#	Type	#
W-2		1099-R (Retirement)		K-1 (S-Corp, Partner, Estate)	
1099-NEC		SSA-1099 (Social Security)		Alimony Received	
1099-INT (Interest Income)		1099-B (Sale of Stocks or Bonds)		Railroad Retirement	
1099-Div (Dividend Income)		Rental Income		1099-C (Cancellation of Debt)	
1099-Misc (IRA, 401k, Retirement)		Installment Sales			
1099-G (Unemployment/State Refund)		Like-Kind Exchanges			

Self-employed? Yes / No     If yes, what type of business?

1099-R / 401K for 2020 (applied for 3 year tax pay)     Yes / No