



# SIEGELAUB ROSENBERG P.A.

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CERTIFIED PUBLIC ACCOUNTANTS & ADVISORS

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## **New Client Checklist**

If you are a new client to our firm, here is a checklist of items needed to get started

### **Individual Clients:**

Name (as it appears on your tax return)

Date of birth

Social security number

Prior tax return filed

### **Corporate Clients:**

Prior tax return filed (if applicable)

Articles of incorporation / organization

Owners name, social security number, title, ownership % and starting

investment Accounting software back up (ex: QuickBooks) and any pertinent

login information General ledger

Prior payroll reports; payroll summary, 941's, RT6's