

SUTTON FINANCIAL SERVICES

333 GELLERT BLVD., STE 247 DALY CITY, CA 94015 | TEL: 650 – 755 - 1040 | FAX: 650 – 887 - 1500

2023 – TAX FILINGS

DATE: _____

NAME: _____

PHONE: _____ - _____ - _____

EMAIL: _____

SPOUSE'S EMAIL: _____

SPECIAL INSTRUCTION (STAFF USE ONLY):

MUST HAVE FORMS FOR 2023 IF ISSUED:

1. IRS CP01A – Identity Protection Personal Identification _____
2. Did you make any 2023 ES Pymts? – Federal _____ State _____
3. Covered California – 1095-A _____

YOU MUST ANSWER THESE QUESTIONS:

1. Any major life changing events: Married, New Child, New Home, or Divorce?
Yes _____ No _____ If answered Yes: _____
2. Did you have Health Insurance in 2023?
Yes _____ No _____
3. Did you have a Foreign Bank Account?
Yes _____ No _____
4. Did you purchase anything over the Internet that you did not pay Sales Tax for?
Yes _____ No _____
5. Have you received, sold, sent, exchanged, or acquired internet in Virtual Currency?
Yes _____ No _____

HOW WOULD YOU LIKE YOUR COPY OF 2023 TAX RETURN?

1. Hard Paper Copy _____ or PDF Email Copy _____ **Verify Bank Account w/ Preparer:**
2. Pick Up Tax Return _____ **- Ask Questions to the Preparer**
3. Mail Tax Return _____

_____ (Staff Initial)

Note: We mail tax returns by USPS Priority Mail and the charge will be \$10 for Postage and Handling.

FOR STAFF USE ONLY:

1. EMAIL PDF to Client _____
2. DocuSign _____ Date _____