

# WELCOME – NEW CLIENT PACKET

Dear \_\_\_\_\_ Phone: \_\_\_\_\_

We are excited for the opportunity to serve your tax needs. Please completely fill out the attached forms and drop in the slot in the bottom of our front door.

We will not be able to begin processing your return unless you complete our forms in advance!

Checklist for your convenience:

- New Client Info Sheet
  - Taxpayer Proof
  - Spouse Proof
  - Dependent Proof
  - Copy of Last Year's Tax Return
  - Required State Filing List
- Read Newsletter (Front and Back)
- 1040 Engagement Letter (Read and Sign/Date)
- Individual Questionnaire (Fill out Front and Back)
- Attach All Your 2022 Tax Documents

If you have any questions about the forms, please contact our staff at the office by calling 301-447-3797 or email us at [info@melissawetzelcpa.com](mailto:info@melissawetzelcpa.com)

We look forward to talking to you soon! And “Thank you” for thinking of us for your tax return preparation needs.

Sincerely,

Melissa and Staff