



**UPBLACK & ASSOCIATES CPA**

## **NEW CLIENT**

For your first visit, please be sure to bring the following documents:

1. Social Security Card for:
  - A. Yourself
  - B. Your Spouse
  - C. Your dependent
  
2. Date of Birth for:
  - A. Yourself
  - B. Your Spouse
  - C. Your dependent
  
3. Picture ID for E-FILE
  
4. Void check for Direct Deposit
  
5. Copy of your last Tax Return Filed.