



Hummingbirds Bookkeeping & Tax Services

 Round Rock, TX

 512-766-9096

Client Intake Checklist

Personal Information

- Full Name
- Social Security Number
- Date of Birth
- Address

Income Documents

- W-2 Forms
- 1099 Forms
- Business income records

Deductions & Credits

- Childcare expenses
- Education expenses
- Medical expenses
- Charitable donations

Business Owners

- Profit & Loss Statement
- Expense records
- Mileage logs