

DATE: _____

NAME: _____

○ **LAST TAX RETURN**

● **INDIVIDUALS**

- 1040 personal tax return for the most recent two years, with all related Schedules.

● **CORPORATIONS**

- Pages 1-5* of 1120 returns for the most recent two years
*Pages 1-6 for year 2018 and later.

● **PARTNERSHIPS**

- Pages 1-6 of 1065 returns for the most recent two years.

○ **BANK STATEMENTS (LAST 3 MONTHS)**

○ **LAST AUDITED NUMBERS**

○ **COPY OF PHOTO ID**

