SIEGELAUB ROSENBERG P.A.
CERTIFIED PUBLIC ACCOUNTANTS & ADVISORS

New Client Checklist

If you are a new client to our firm, here is a checklist of items needed to get started

Individual Clients:

Name (as it appears on your tax return)

Date of birth

Social security number

Prior tax return filed

Corporate Clients:

Prior tax return filed (if applicable)

Articles of incorporation / organization

Owners name, social security number, title, ownership % and starting investment

Accounting software back up (ex: QuickBooks) and any pertinent login information

General ledger

Prior payroll reports; payroll summary, 941's, RT6's