PREFERRED ACCOUNTING

Life Changes & Events Tax Document Checklist

Adoption

Date Finalized:_____

Date of Birth: _____

Legal Name: _____

SSN: _____

Bankruptcy

_____
_____
_____
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_____
_____

Birth

Date of Birth: _____

Legal Name: _____

SSN: _____

Disaster

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_____
_____

Divorce

Date Finalized: _____

Include a Copy of Decree

Supply Extra Information

Inheritance

_____
_____
_____
_____
_____
_____
_____
_____
_____
_____

Marriage

Date of Marriage:_____

New Last Legal Name (If Applicable):

_____

Purchased a Home

Please, include a copy of the Settlement Statement