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Tax Services Onboarding

HOW-TO INFORMATION FOR NEW CLIENTS

Thank you for choosing Storen Financial for your tax planning and preparation needs. Our team of seasoned tax professionals will work with you to utilize tax-saving strategies that are tailored to your unique situation.

In order to make your onboarding experience easier, we've compiled everything you need to get started.

DOCUMENTS NEEDED FOR ONBOARDING:

- Storen Financial New Client Data Sheet
- Storen Financial Direct Deposit Form
- Copy of Prior 2 Years Tax Returns

DOCUMENTS NEEDED FOR TAX PREPARATION & PLANNING:

- All of the information, forms, W-2s, expense totals, etc. needed to complete a tax return. Use our helpful "Checklist Worksheet" as your guide to collecting these documents.

Helpful Tool!

FORMS NEEDED TO COMPLETE A TAX RETURN:

- Storen Financial Engagement Letter
- Storen Financial Tax Questionnaire

OPTIONS FOR HOW TO SUBMIT DOCUMENTS:

- Upload to your secure Storen Financial Client Portal (Please contact us to request access.)
- Drop off documents at our office in Zionsville
- Place documents in one of our secure lockboxes (Located in Brownsburg or Zionsville. See instructions on our website.)

For data security purposes, please do NOT email personal or financial information.

OTHER QUESTIONS / RESOURCES

For more information, tools, resources and forms visit our website at **www.storenfinancial.com/tax-season** or contact our team at any time.

Does your investment advisor consider your long-term TAX impact?

Our team of experienced professionals work with you to develop a comprehensive, long-term financial plan that implements customized tax-saving strategies that fit your unique situation.

These strategies not only focus on investments and stock portfolios, but factor in elements such as Medicare, Social Security, legacy planning, and much more.

DID YOU KNOW?

Greg Storen is a long-term member of Ed Slott's Elite IRA Advisor Group, an exclusive organization dedicated to the ongoing study and mastery of constantly changing and complex tax laws impacting your retirement savings.

Ask us how!

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New Client Data Sheet

Thank you for choosing Storen Financial. Please note that this information will be used for all services provided by Storen Financial, so please complete and verify the accuracy of this information.

CLIENT 1

☑ Check Preferred Contact Method (select one)

Legal First Name:		Mobile Phone:	☐
Preferred First:		Home Phone:	☐
Middle Initial:		Work Phone:	☐
Legal Last Name:		Home Email:	☐
SSN:		Work Email:	☐
DOB:		Employer:	
Retired?:	☐ Yes ☐ No	Occupation:	

CLIENT 2

Legal First Name:		Mobile Phone:	☐
Preferred First:		Home Phone:	☐
Middle Initial:		Work Phone:	☐
Legal Last Name:		Home Email:	☐
SSN:		Work Email:	☐
DOB:		Employer:	
Retired?:	☐ Yes ☐ No	Occupation:	

Own a Business?:	☐ Yes ☐ No	Business Name:	

ADDRESS

Street	City	State	Zip

CHILDREN

☑ Check if child qualifies as a dependent.

Dep.	Legal First Name	Legal Last Name	SSN	DOB
☐				
☐				
☐				
☐				
☐				
☐				

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Direct Deposit

This bank account verification form is used for direct deposit. Please complete the form below and double-check your numbers. You must sign at the bottom of this document for this verification form to meet the guidelines.

BANK ACCOUNT INFORMATION

Name on Account:	
Bank Name:	
Bank Routing Number (9 Digits):	
Account Number:	
Checking or Savings?	☐ Checking ☐ Savings

Signature ______________________________ Date ____________________

