



1751 S. Naperville Road, Suite 102, Wheaton, Illinois, 60189-5896
630-668-3030 P 630-668-2757 F www.defilippisfinancial.com
TAX RELATED EMAIL: steve@defilippisfinancial.com
INVESTMENT RELATED EMAIL: stephen.defilippis@ceterafs.com

Stephen W. DeFilippis, EA, Financial Adviser
 Licensed to Represent Taxpayers Before the IRS

Member: Illinois Society of Enrolled Agents
National Association of Enrolled Agents

RETURNING CLIENT APPOINTMENT DATA WORKSHEET

2018 TAX RETURNS

Client Names	First Name	Middle Initial	Last Name	Suffix
Your Name:				
Spouse's Name:				

Client's Phone (daytime):		Client's Phone (evening):	
Spouse's Phone (daytime):		Spouse's Phone (evening):	

Client's email:	
Spouse's email:	

TAX TRANSACTIONS

During 2018:	YES	NO
Did you sell a residence?		
Did you purchase any rental properties?		
Did you sell rental properties?		
Were you or your spouse self-employed in 2018 but NOT in 2017?		
Did you purchase any limited partnership interests?		
*If yes, how many?		

Did you sell stocks, bonds or mutual funds?		
*If yes, how many transactions?		
Note: bring in Form 1099B received in January.		
Did you refinance and pay points during 2018?		
Are you bringing in other family members' returns to be done such as children or parents?		
Additional information you would like to include:		

Appointment Preference

Date	Day (M-W-F)	Morning	Afternoon	Evening	Preference
		:	:	:	1 st Choice
		:	:	:	2 nd Choice
		:	:	:	3 rd Choice
	(SAT)	:	:	:	Saturday, when available