



Welcome to Genesis Tax & Business Service LLC

Thank you for choosing Genesis Tax & Business Service LLC.

Our mission is to provide proactive tax, accounting, bookkeeping, payroll, and advisory services that help individuals and businesses achieve financial clarity and compliance.

Genesis provides tax preparation, tax planning, bookkeeping, payroll, business advisory, compliance support, and nonprofit consulting services

Service Selection Form

- ☐ **Individual Tax Return**
- ☐ **Business Tax Return**
- ☐ **Bookkeeping Services**
- ☐ **Payroll Services**
- ☐ **Tax Planning & Advisory**
- ☐ **Business Formation**
- ☐ **Nonprofit Services**
- ☐ **Other: _____**



Client Information Sheet

Full Name: _____

Business Name: _____

Address: _____

Phone: _____

Email: _____

Date of Birth: _____

SSN/EIN: _____



Document Request List

- ☐ **Driver's License or Government ID**
- ☐ **Social Security Cards (if applicable)**
- ☐ **Bank Statements**
- ☐ **Business Financial Statements**
- ☐ **Payroll Reports**
- ☐ **Sales Tax Report**

Secure Client Portal Instructions

**Upload documents securely through the Genesis Client Portal.
Do not send sensitive tax information through unsecured email whenever possible**

Communication Policy

Genesis communicates through the secure portal, email, phone, and scheduled meetings.

Response times may vary based on workload and filing deadlines

Payment Policy

Invoices are due upon receipt unless otherwise agreed. Advisory and bookkeeping services may require recurring payment arrangements



CLIENT DOCUMENT CHECKLIST

Please upload the following documents to your secure client portal.

PERSONAL INFORMATION

- ☐ Driver's License / ID
- ☐ Social Security numbers for all family members
- ☐ Last year tax return (if new client)

INCOME DOCUMENTS

- ☐ W-2 Forms
- ☐ 1099-NEC / 1099-MISC
 - ☐ 1099-INT
 - ☐ 1099-DIV
 - ☐ 1099-B
 - ☐ SSA-1099
- ☐ 1099-R retirement income
 - ☐ K-1 forms

HEALTH INSURANCE

- ☐ Form 1095-A (Marketplace Insurance)

HOMEOWNERSHIP

- ☐ Form 1098 mortgage interest
- ☐ Property tax statements
- ☐ Closing statement if home purchased or sold

BUSINESS / SELF-EMPLOYED

- ☐ Profit & Loss summary
- ☐ Business expenses summary
 - ☐ Mileage log

- ☐ Equipment purchases

DEDUCTIONS

- ☐ Charitable donations
- ☐ Medical expenses

- ☐ Education expenses (Form 1098-T)



Referral Program

Referrals are appreciated. Ask Genesis about referral incentives and client appreciation programs.

Engagement Acknowledgment

I acknowledge that I am responsible for providing complete and accurate information necessary for the preparation of tax returns and advisory services.

Client Signature: _____

Date: _____

Genesis Representative: _____

Date: _____