

Welcome to GBW Tax Solutions, LLC.

We are pleased to welcome you as a new client. Attached you will find the client information sheet and list of all the documents needed to complete your income tax return.

- Client information sheet (please fill out the form in its entirety)
- Tell us how you are filing:
 - Single
 - Head of household (Must have the appropriate qualifying person/dependent(s) to file documents)
 - Married Filing Jointly
 - Married Filing Separately
- Driver's License
- Social Security card (if filing head of household Social Security cards for all qualifying person/dependent(s))
- Child Care/Day Care Expenses (can be obtained from the care provider)
- Bring 1098-T if you paid college tuition (it may have been e-mail or received by mail if you do not have it contact the school or obtain it from the student's school portal).
- Proof of Health Care Insurance (employer should provide 1095 B, C)
 - If through the Healthcare Marketplace provide a 1095-A
- Include all documents received (W2's 1099's, ETC.) during the applicable tax year.
- Include any letters from the IRS (Internal Revenue Service) or State (Georgia Department of Revenue)
- Please provide your prior year's tax return that was filed so we can review it.

Please fax or email all information that pertains to your income tax return to the email or e fax number listed below. Please refrain from sending pictures of documents or texting copies of them.

Home Owners

In addition to the documents listed above, homeowners need to bring their 1098 Mortgage statement (make sure you let us know if you are planning to purchase a home within the next two years as it could affect the way we file your taxes this year).

Small Business Owners/Future Business Owners

Allow GBW Tax Solutions, LLC to assist you in minimizing your tax liability. We can utilize your existing business(s) and or make your dreams a reality. We will set up everything for you. Let us know if you would like more information.

If you have any questions or concerns, feel free to us at 678-502-9261. Please allow 24-72 business hours for processing of incoming documents. Feel free to text us as well