



- ❖ TAX PREPARATION
- ❖ AUDIT REPRESENTATION
- ❖ TAX & RETIREMENT PLANNING
- ❖ NEW BUSINESS CONSULTING
- ❖ INTERNATIONAL MATTERS

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## Driver's License Requirement for Tax Preparation

New York State has alerted the public and tax practitioners about a new requirement DUE TO RAMPANT IDENTITY THEFT. In order to file your tax return, certain identification is now required, and this must be provided to your tax professional. If you do NOT provide it, your refunds will be held up, and tax return processing will be delayed.

Fill out the form below and attach a copy of the license or ID. **If you are married, your spouse must complete a separate form.**

For New York, please fill out either the New York Driver's License portion or the New York State-Issued ID portion. The document number is a 10-digit alpha-numeric character located either on the lower-right side of the front or in the back of the license or ID. Outside of New York, please fill out the Non-New York Driver's License portion or the Non-New York State-Issued ID, where applicable.

If you do not have any of these, please check No Driver's License or State-Issued ID option below.

**CLIENT NAME** \_\_\_\_\_

**NEW YORK DRIVER'S LICENSE**

License # \_\_\_\_\_

Document # \_\_\_\_\_

Date Issued \_\_\_\_\_

Expiration Date \_\_\_\_\_

**NEW YORK STATE-ISSUED ID**

License # \_\_\_\_\_

Document # \_\_\_\_\_

Date Issued \_\_\_\_\_

Expiration Date \_\_\_\_\_

**NOTE:**

NYC ID cards are NOT State-Issued IDs

**NON-NEW YORK DRIVER'S LICENSE**

State \_\_\_\_\_

License # \_\_\_\_\_

Date Issued \_\_\_\_\_

Expiration Date \_\_\_\_\_

**NON-NEW YORK STATE-ISSUED ID**

State \_\_\_\_\_

License # \_\_\_\_\_

Date Issued \_\_\_\_\_

Expiration Date \_\_\_\_\_

**CHECK THIS BOX IF NO DRIVER'S LICENSE OR STATE-ISSUED ID**