



162 Co Hwy 109
Broadalbin, New York 12025
518-883-4770
Taxes.SJW@outlook.com
www.SusanJWalterinc.com

Please complete all relevant information and return to us along with your documents.

You may submit this form via email to Taxes.sjw@outlook.com, by dropping off in our customer drop box by the office door or Mail to the above address. If you prefer a portal to send secure documents, please call our office to give your email and request a link.

Taxpayer Name: _____ Soc. Security # _____

Spouse Name: _____ Soc. Security # _____

Email: _____ Text: _____ Best Phone: _____

Address: _____

Bank Account: Routing # (9) _____ Account # _____ Checking / Savings

Unemployment \$ _____ Jury Duty _____

Health Insurance with the Market Place: Yes / No If yes attach 1095A

Driver's License: NO Change? If Changed or Renewed:

Taxpayer ID # _____ State Issued _____ *Doc ID # _____

Issue Date: _____ Expiration Date: _____

Spouse ID # _____ State Issued _____ *Doc ID # _____

Issue Date: _____ Expiration Date: _____

- DOC ID # are the first 3 characters. It can be found either:
 - On the back of your license
 - Enhanced Licenses are on the back: after **IDUSA**

We will call you if we are missing information. Should you need to call the office the number is 518-883-4770 ext 2. If you get the answering machine, please leave your name and phone number, someone will get back to you within 24 hours.

Please include Unemployment, W2's, 1099s, mortgage statements and all your usual documents.