

Client Information Sheet

Mark all boxes () if same as prior year

Tax Year: _____

Taxpayer: _____ DOB _____ SS# _____ - _____ - _____

Spouse: _____ DOB _____ SS# _____ - _____ - _____

Current address: _____

If filing state return Taxpayer State _____ License# _____ Issue Date _____ Expiration Date _____

If filing state return Spouse's State _____ License# _____ Issue Date _____ Expiration Date _____

Contact Information:

Work: (_____) _____ - _____ Home: (_____) _____ - _____

Cell: (_____) _____ - _____ Best time to call: _____

Email address Taxpayer: _____ Email address Spouse: _____

Dependents (or persons living in your household eligible to be claimed)

Yes No

Name _____ DOB ___/___/____ SS# _____ - _____ - _____ College

Name _____ DOB ___/___/____ SS# _____ - _____ - _____ College

Name _____ DOB ___/___/____ SS# _____ - _____ - _____ College

Bank Account Information For IRS Withdraw Or Deposit:

Bank Name _____ Account Type: Checking _____ Savings _____ Joint _____

Account Number _____ Routing Number _____

	<u>Yes</u>	<u>No</u>
Did you or your spouse receive Unemployment in 2023?	<input type="checkbox"/>	<input type="checkbox"/>
Did you buy and/or sell a house in 2023? (If yes, provide the closing statement(s) for the property)	<input type="checkbox"/>	<input type="checkbox"/>
Did you buy or sell any stock in 2023? (If yes, please provide 1099)	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a foreign bank account , or any foreign investments?	<input type="checkbox"/>	<input type="checkbox"/>
Did you buy, sell, exchange, or send any virtual currency ? If yes, provide all necessary document.	<input type="checkbox"/>	<input type="checkbox"/>
Did you buy any clean energy new or used vehicle? If yes, provide a copy of the registration.	<input type="checkbox"/>	<input type="checkbox"/>
Did you install any energy efficient improvements or energy property in your residence such as exterior doors or windows, insulation, central air conditioners, or water heaters? If yes, provide details:	<input type="checkbox"/>	<input type="checkbox"/>
Did you install any alternative energy equipment in your residence such as solar water heaters, solar electricity equipment (photovoltaic) or fuel cells? If yes, provide a certificate.	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay for childcare while you worked or looked for work? If yes, provide details:	<input type="checkbox"/>	<input type="checkbox"/>
Did you or any dependents enrolled at least part-time in any higher education If yes, provide Form 1098-T (Tuition)	<input type="checkbox"/>	<input type="checkbox"/>

Did you have marketplace health insurance during 2023? If yes, provide Form 1095-A

Preferences:

Refund from IRS: Direct Deposit (Yes No) or Paper Check (Yes No)

Balance due to IRS: Direct Debit (Yes No) or Mail in Check (Yes No)

Did You Pay Estimated Income Tax Payments (Not Payroll Taxes)

1st Estimated Payment Date _____ Amount Paid \$ _____

2nd Estimated Payment Date _____ Amount Paid \$ _____

3rd Estimated Payment Date _____ Amount Paid \$ _____

4th Estimated Payment Date _____ Amount Paid \$ _____

I (We) have submitted this information for the sole purpose of preparing my (our) tax return. This information is true, correct, and complete to the best of my (our) Knowledge.

Accepted by: _____

Taxpayer's signature

Date: _____

Spouse's signature

Date: _____