

Prior Client Update

I dropped off ___ All expected tax documents today ___ Partial documents ___ No documents.

****If you had to renew your driver's license last year, please provide your new ID to the receptionist****

Yes, I would like to use Direct Deposit for any refund owed to me. Please verify banking institution by providing a cancelled check or deposit slip. Or verify what we have on file.

Primary Taxpayer Name: _____ **Occupation:** _____

**Primary Taxpayer is the client listed first on your previous tax return if filed jointly.*

Phone Number: _____ * cell home work (ext. _____)*

Joint Taxpayer Name: _____ **Occupation:** _____

Phone Number: _____ * cell home work (ext. _____)*

If a Business, Trust, Estate, or other, name of contact: _____

Best Email Address(es): _____

**Your taxpayer will contact you via email with questions or request for additional information.*

Enter the amount, (if any) of the Economic Impact Payment #3 that was issued to you. \$ _____ (If this information is not reported correctly, it can delay your tax return and/or change your calculations)

Updates to Contact Information

Contact information, including address and email used last year is the same: Yes No

If No, please provide updated information: _____

Other Email: _____ *

Did your Marital Status or Number of Dependents change? * Yes No Marital Status: _____

Please Provide Updates/Changes to Dependents Information, if any:

Name	SS#	D. O. B.	Months lived w/ you

At anytime during the tax year, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any Virtual Currency? Yes _____ No _____