

Returning Clients ONLY *Do Not Write Same Below Please Give Detail*

Name(s) _____
Occupation(s) _____
Address: _____
E-Mail Address: _____
Phone # : _____
Identity Protection PIN: Did IRS Issue you ID PIN? <input type="checkbox"/> Yes <input type="checkbox"/> No

Bank Account Information	
Do you want Direct Deposit?	<input type="checkbox"/> No <input type="checkbox"/> Yes: Do Not Write SAME Below
Bank Name: _____	<input type="checkbox"/> Checking
Routing Number: _____	<input type="checkbox"/> Savings
Account Number: _____	

Changes During The Tax Year	
Marital changes? Yes, provide information in Notes to Tax Preparer	<input type="checkbox"/> Yes <input type="checkbox"/> No
Dependent Questions	
New Dependents for tax year? If yes please provide Full Name, DOB, & SSN	<input type="checkbox"/> Yes <input type="checkbox"/> No
Changes to dependents? Few Common Changes are: 1) Dep Filed their own return b/c (a) Worked during tax year (b) Started college (2) Claimed on another persons tax return	<input type="checkbox"/> Yes <input type="checkbox"/> No
Dependent Care Expense Did you have this expense so you could work or go to school?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Other Questions	

ALASKA PFD - Please tell us who received PFD for this tax year.	<input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Dependents #	
Health Insurance Rcv'd Through Market Place?	Yes, Need Form 1095-A	<input type="checkbox"/> Yes <input type="checkbox"/> No

Crypto Currency At any time during tax year did you (a) receive, as a reward, award, or payment for property or services or (b) sell, exchange, gift or otherwise dispose of a digital asset or financial interest in any virtual currency example Bitcoin and Ethereum?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Stock Trading During tax year did you do any stock trading? Ex Robinhood, Acorn, Coinbase	<input type="checkbox"/> Yes <input type="checkbox"/> No
Gig Economy During Tax Year did you have any of following : Rent your personal property suchas your car using Turo or on your own? Rent your RV? Did you Uber/Lyft drive your car to transport people or food?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Rcv'd unemployment?	*Yes Need 1099-G <input type="checkbox"/> Yes <input type="checkbox"/> No
Paid tuition/fees?	*Yes Need 1098-T <input type="checkbox"/> Yes <input type="checkbox"/> No
Student Loans Paid?	*Yes Need 1098-E <input type="checkbox"/> Yes <input type="checkbox"/> No
Bought, Sold, Refinance Prop?	*Yes Need HUD-1 <input type="checkbox"/> Yes <input type="checkbox"/> No
Energy Improvement Credit Did you make any new energy-efficient improvements to your home? If yes, provide details to Tax Preparer.	<input type="checkbox"/> Yes <input type="checkbox"/> No

NOTES TO TAX PREPARER:

I authorize the above information to be used for the preparation of my income tax return.

Taxpayer: _____ **Date:** _____

Spouse: _____ **Date:** _____