

2023 Tax Return Client Information

Date: _____

Name: (print): _____ **New Client?** YES

Signature: _____

Phone number: _____ **Email Address:** _____
(*preferred contact method)

1) Address Change (new clients please fill out address)

Did you move or change your address during 2023? YES NO

If YES, please provide your new mailing address: _____

2) New Clients

Name, Date of Birth & SSN of each person living in your household.

NAME _____ DOB _____ SSN _____

NAME _____ DOB _____ SSN _____

NAME _____ DOB _____ SSN _____

NAME _____ DOB _____ SSN _____

3) Bank Account Information:

*If no change from prior year, write "NO CHANGE"

Bank Name: _____

Routing Number: _____ Account Number: _____

Checking Savings

• **Do you want refund Direct Deposited?** YES NO

• **Do you want payment deducted from bank account?** YES NO

4) Health Insurance

Did all members of your household have health insurance for 2023? YES NO

- If you used MARKETPLACE or received a supplement payment for your health insurance during 2023, please provide us with Form 1095-A to prepare the 2023 tax return. If the form is not currently available, please provide as soon as it becomes available to you. You cannot file your return until we have this form.

5) 2023 State Use Tax

For the year 2023, did you make untaxed purchases from out-of-state retailers (e.g., online purchases) and not pay sales tax?

YES NO

If YES, you need to provide a list (on a separate sheet of paper) of retailers with the amount of the purchase to report on your state income tax return.

6) Virtual Currency

At any point during 2023 did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?

YES NO

If YES, we need to know the date sold, date acquired, sale price, and basis.

7) 2023 Federal & State Estimated Tax Payments

Did you make estimated tax payments in 2023?

*If so, what was the amount?

April 2023(Federal)	\$ _____	(State) \$ _____
June 2023(Federal)	\$ _____	(State) \$ _____
September 2023(Federal)	\$ _____	(State) \$ _____
January 2024(Federal)	\$ _____	(State) \$ _____