

**Client Information Sheet - Current Client**

Taxpayer Name \_\_\_\_\_ Spouse Name \_\_\_\_\_

Has there been any changes to job titles? If so please list them: \_\_\_\_\_

Address \_\_\_\_\_ County \_\_\_\_\_ School Dist \_\_\_\_\_

Has there been any changes to marital status? Yes - Please explain \_\_\_\_\_

Phone # \_\_\_\_\_ Residency: Full year \_\_\_\_\_ Part Year \_\_\_\_\_ Date of move \_\_\_\_\_

Email \_\_\_\_\_

Dependent Name/Relationship

Social Security #

Date of Birth

**Please provide a copy of SS Card and Birth Certificate for all children**

**We also request a school record, medical record or child care provider stmt, that show name and address for child. This is required if you are claiming Head of Household or the Child Tax Credit.**

\_\_\_\_\_  
\_\_\_\_\_

**If you renewed your license in 2020 - to present, please fill in the new information below:**

Taxpayer

Spouse

Divers License Number \_\_\_\_\_

\_\_\_\_\_

Issue Date of DL \_\_\_\_\_

\_\_\_\_\_

Expiration Date of DL \_\_\_\_\_

\_\_\_\_\_

ID code on License \_\_\_\_\_

\_\_\_\_\_

(on back of new licnese, lower right corner of old license)

**Refunds or Balance Due Options**

Refund \_\_\_\_\_ Direct deposit to your bank (2-4 weeks)

Routing Number \_\_\_\_\_ Account Number \_\_\_\_\_

\_\_\_\_\_ Paper check (6-8 weeks)

Balance Due \_\_\_\_\_ Electronic Funds Withdrawal (to be done on \_\_\_\_\_, 2023)(fill in acct info above)

\_\_\_\_\_ Pay by voucher/check by 4/15/23

**Charitable Contributions**

Cash/Check/CC \_\_\_\_\_ Non Cash Donations (detailed list required) \_\_\_\_\_

**Did you have any transactions with virtual currency? If so please contact me**