

CLIENT INFORMATION SHEET

(Please complete and include with tax documents for each tax filer)
 (You may also upload this document to your client portal)

Taxpayer Name	
Address	
City, State	
Phone Number	
Email Address	
Email Address -Spouse	

If your current address is different from your prior year’s tax return, please document the date of move: _____

Did you have a change in marital status in 2024? If so, please indicate the date of the change and the status:

Date of change: _____ Married Divorced Widowed

Did you gain new Dependents in 2024? If yes, please provide the following:

Name _____ SSN: _____ DOB: _____
 Name _____ SSN: _____ DOB: _____
 Name _____ SSN: _____ DOB: _____

Did you or anyone else in your family that you are submitting documentation for receive an Identity Protection Pin? If so, please provide the name & pin number:

Name: _____	Pin #: _____
Name: _____	Pin #: _____
Name: _____	Pin #: _____
Name: _____	Pin #: _____
Name: _____	Pin #: _____

Driver's License Information: Please include a copy of your driver's license or state ID for **each family member that is filing a tax return** or complete the information below:

Name	Issuing State	ID #	Issue Date	Expiration Date

Crypto Transactions: At any time during 2024, did you: (a) receive crypto as a reward, award, or compensation; or (b) sell, exchange, gift, or otherwise dispose of a digital asset?

YES NO

Direct Deposit Option: If you would like your tax refund direct deposited, please provide the following information:

Direct Deposit (circle selection)	Yes	No
Type Account (circle selection)	Checking	Savings
Routing Number		
Account Number		

Delivery Options:

- E-Sign Authorization Form? (Must have client portal access)
- Pick up completed return at our office
- Mail completed return (additional shipping/handling fee of \$15)

Notes for Preparer: Please list any additional details that will assist the preparer:

INDIVIDUAL INCOME TAX REMINDERS

Below is a list of items in which documentation needs to be provided to complete your tax return if applicable. Please review the list as a helpful reminder:

SOURCES OF INCOME:

- Alimony Received (If divorced before 12/31/2018)
- Dividends (1099-DIV)
- Credit Card /Payment Company Income (i.e. PayPal, Venmo, 1099-K)
- Farming (P&L Statements, Balance Sheets)
- Gambling (Win/Loss Statements, (Form W-2 G)
- Interest Income (1099-INT)
- Miscellaneous Income (1099-MISC)
- Non-Employee Compensation (1099-NEC)
- Partnerships and S Corporation (K-1)
- Rental Income (Include list of improvements and related costs)
- Royalties
- Self-Employment Income (P&L Statements, Balance Sheets)
- Social Security Benefits
- Stocks/Asset Sales (1099-B, acquisition/cost basis)
- Unemployment Income
- Wages (W-2)

INDIVIDUAL INCOME TAX REMINDERS

CREDITS/EXPENSES:

- 529 Contributions
- Charitable Contributions
- College Tuition (1098-T)
- Crypto/Virtual (Bitcoin) Currency Transactions
- Daycare Expenses
- Debt Cancellation
- Distribution from retirement accounts (1099-R)
- Electric Vehicle Purchase (8936)
- Energy Saving Home Improvements
- Federal, State and Municipal Estimated Tax Payments Made
- Federal, State and Municipal Income Tax Refunds Received
- HAS Contributions (5498 SA) or Distributions
- Health Insurance Through The Marketplace (1095-A)
- Home Purchase (HUD/Settlement Statement)
- Home Sale (1099-S)
- IRA Contributions
- Medical Expenses (If > 7.5% of Adjusted Gross Income)
- PMI
- Real Estate Taxes Paid
- Student Loan Interest (1098-E)