



To better serve you in meeting your tax preparation needs, we ask that you take a few minutes to fill out the information below. If you have any questions, please let us know!

Primary Taxpayer

Name: _____

DOB: _____

SSN#: _____

Occupation: _____

Address: _____

City, State, Zip: _____

Phone: _____

Email: _____

Preferred method of contact: Email Phone

Spouse

Name: _____

DOB: _____

SSN#: _____

Occupation: _____

Address: _____

City, State, Zip: _____

Phone: _____

Email: _____

Preferred method of contact: Email Phone

Marital Status: Single Married Head of Household

Dependents (if applicable):

Name	Relationship	DOB	SSN#	Student?	Disabled?
				<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N
				<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N
				<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N
				<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N

* If any dependents did not live at the primary taxpayer's address the entire year, please let us know.

Can you/your spouse be claimed as a dependent by someone else? Yes No

Do you have an interest or signature authority over a financial account located in a foreign country? Yes No

During 2021 did you receive/sell/exchange or dispose of any financial interest in virtual currency? Yes No

During 2021 did you receive the \$1,400 COVID-19 stimulus payment? Yes No

If no, how much stimulus payment was received in 2021? \$ _____

During 2021 did you make any charitable cash contributions? Yes No

If yes, how much were your total charitable cash contributions for the year? \$ _____

During 2021 did you receive any Advance Child Tax Credit payment(s)? Yes No

If yes, what is the total amount of Advance Child Tax Credit payment(s) received in 2021? \$ _____

For any tax payments or refunds would you like us to use your bank account? Yes No

Bank Name: _____ Account Type (Checking or Savings): _____

Routing #: _____ Account #: _____