**Client Information Sheet**

**Tax Year: 2022**

**Direct Deposit:**

Name of Banking Institution: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

Checking\_\_\_\_\_\_\_\_\_ Savings\_\_\_\_\_\_\_\_\_

**Contact Information:**

Daytime phone number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

E-Mail address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Current mailing address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**General Information:**

Change in Marital Status………………………………………………………………………………………………… Yes\_\_\_\_ No\_\_\_\_

New Spouse: Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SS#\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ DOB\_\_\_\_\_\_\_\_\_\_\_

Divorce Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Change in Dependents…………………………………………………………………………………………………… Yes\_\_\_\_ No\_\_\_\_

Dependent to take off: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

New Dependent: Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SS#\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ DOB\_\_\_\_\_\_\_\_\_\_

Live with you more than 6 months? ……………………………………………………………………………... Yes\_\_\_\_ No\_\_\_\_

\*\*\* **If No, must have form 8332 Release of Claim of Exemption \*\*\***

Is the dependent other than a son or daughter? ............................................................... Yes\_\_\_\_ No\_\_\_\_

**\*\*\* If other than son or daughter, we must have documentation showing proof of address \*\*\***

**Health Insurance & College Expense:**

Do you have a health savings account? ………………………………………………………………………… Yes\_\_\_\_ No\_\_\_\_

**\*\*\* Need form 1099 SA and 5498 SA \*\*\***

Did you receive health care premium payments? ………………………………………………………… Yes\_\_\_\_ No\_\_\_\_

**\*\*\* Need form 1095-A \*\*\***

Did you pay for college tuition, fees, books, student loan interest, etc. ………………………… Yes\_\_\_\_ No\_\_\_\_

**\*\*\* Need form 1098 T \*\*\***

**Income:**

Did you buy or sell any digital assets (i.e., Bitcoin, NFTs, or other cryptocurrency)? …. Yes\_\_\_\_ No \_\_\_\_

Any changes in income (start business, rental property, etc.)? …………………………………… Yes\_\_\_\_ No\_\_\_\_

Explanation of changes \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Have you filed 1099’s for contract labor? ...………………………………………………………………… Yes\_\_\_\_ No\_\_\_\_

Did you make any federal or state estimated tax payments? ……………………………………………………… Yes\_\_\_\_ No\_\_\_

Were the estimates paid on time as calculated? …………………………………………………………… Yes\_\_\_\_ No\_\_\_

**\*\*\*\* WE DO NOT ACCEPT CREDIT OR DEBIT CARD PAYMENTS\***