

Current Client Questionnaire **To ensure our records are up-to-date, you must complete all fields.

Your Name _____ Date _____

- Best phone number to reach you: _____
- Taxpayer email address: _____
- Spouse (if applicable) email address: _____
- Address **if different** from last year: _____
- Any Dependent Changes ** Please be sure to let us know if we should remove any dependents. If you do not tell us we do not know to remove a dependent and we assume the dependent from the previous year are claimed again this year

Add Name: _____ DOB _____ SSN _____

Add Name: _____ DOB _____ SSN _____

Remove Name: _____

- If you are receiving a refund, do you want Direct Deposit? Yes No Use Same Account Yes No
If you answered "NO" to same account above, please provide:

Bank Name _____ Checking or Savings

Account Number _____ Routing Number _____ Joint Account Yes No

- Select method of receiving copy of your return: Electronic copy OR Paper copy
The Electronic copy will be sent to the email address noted above once the tax return is paid for.

- Do you have a Foreign Bank Account Yes No

- At any time during 2021, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? Yes No

- Did you receive unemployment income in 2021? Yes No If yes, we will need a copy of 1099-G

*It is very important that both the 3rd stimulus amount and/or the advance child tax credit amounts be exact and accurate. These are not counted as income but could affect your potential refund/balance due.

- Did you receive the 3rd round of stimulus checks? Yes No If yes, how much \$ _____
(This is NOT the January 2021 payment. It is the payments that began on March 12, 2021)

Disclaimer: I believe I received all the stimulus funds I was entitled do and do not wish to provide amounts. I understand that by not providing the amounts it could potentially affect my refund/balance due. Initials _____

- Did you receive any advance child tax credit payments? Yes No If yes, how much \$ _____

Disclaimer: I believe I received all the advance child tax credit payments I was entitled do and do not wish to provide amounts. I understand that by not providing the amounts it could potentially affect my refund/balance due. Initials _____

- **Homeowners:** If you answer yes to any of the following questions, we will a need copy of financing statement

Did you purchase a home last year? Yes No Did you sell a home last year? Yes No

Did you refinance your home last year? Yes No

- **If you are a Business Owner?**

Were you issued a 1099 for your business? Yes No What type of business is it? _____

*Make sure you provide a categorized breakdown of any business expenses ex. Office supplies, telephone

Please Sign Back of Form

