

New Client Questionnaire \*\*Please include a copy of your prior year's tax return and your drivers licenses\*\*

Your Name \_\_\_\_\_

Date \_\_\_\_\_

- Spouse's Name (if applicable) \_\_\_\_\_
- Best phone number to reach you: \_\_\_\_\_
- Taxpayer Email address \_\_\_\_\_
- Spouse (if applicable) email address: \_\_\_\_\_
- Taxpayer DOB: \_\_\_\_\_ Spouse DOB: \_\_\_\_\_
- Dependent: \_\_\_\_\_ DOB \_\_\_\_\_ Dependent: \_\_\_\_\_ DOB \_\_\_\_\_
- Dependent: \_\_\_\_\_ DOB \_\_\_\_\_ Dependent: \_\_\_\_\_ DOB \_\_\_\_\_

- If you are receiving a refund do you want Direct Deposit?  Yes  No

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 3<sup>rd</sup> 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 3<sup>rd</sup> 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 to 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 to 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 need a 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

How did you hear about us? \_\_\_\_\_

**Please Sign Back of Form**

