

Current Client Questionnaire To ensure our records are up to date, you must complete ALL fields EVERY YEAR

Your Name: _____ Date: _____

Spouse's Name (If applicable): _____

Best phone number to reach you: _____

ALL TAX RETURNS WILL BE ELECTRONICALLY FILED

Both you and your spouse (if applicable) will be required to sign the Electronic filing forms

1. Please select ONE option below for obtaining the required electronic filing signatures:

 OPTION A: TAXDOME PORTAL: The required signature documents for filing of your tax return will be emailed to you and your spouse (if applicable) separately through Verifyle for e-signature and must be signed before the filing deadline. A copy of your tax return along with possible payment vouchers and estimated coupons will be uploaded to the TaxDome portal.

If you select Option A: A separate and valid email address for each signer is **REQUIRED**.

Taxpayer email: _____

Spouse (if applicable) email: _____

 OPTION B: PAPER PACKAGE: You will be required to come into the office to pick up your tax return copy and **BOTH** signers will be required to sign the necessary documents for filing your tax return before the filing deadline. An electronic copy will also be uploaded to our secure TaxDome portal.

2. If you are receiving a refund, do you want Direct Deposit? Yes No

If you requested Direct Deposit, do you want us to use the same bank information from last year? Yes No

If you did not provide bank information last year or have a NEW bank, please provide bank information:

Bank Name _____

Account Number _____ Routing Number _____

Is this a Checking or Savings _____ Is this a Joint Account? Yes No

3. Address if you moved in 2023: _____ Date of Move _____

Did you purchase, sell or refinance a home in 2023? Yes No

If you answered YES, we will need a copy of the Closing Disclosure Statement or HUD1 document.

4. Please list the name of any dependents we need to remove from your return. If you do not tell us to remove a dependent, we assume the dependent(s) from the previous year are claimed again this year.

5. Please list any dependents we need to add to your return. All fields must be completed.

Full Name _____ DOB _____ SSN _____

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6. Did you have a foreign bank account in 2023? Yes No

7. Are you a business owner or have rental property? Yes No Please specify Business or Rental? _____

8. Did you receive a 1099-K from Venmo, Paypal, Ebay, Cashapp, etc? Yes No

If you answered yes, we will need a copy of the 1099-K and an itemized list of related expenses.

9. **DIGITAL ASSETS:** At any time during 2023, did you sell, exchange or purchase any goods with crypto currency (Ex: virtual currency, nonfungible tokens (NFTs), tokenized assets, stable coins, security tokens)? Yes No
If you answered yes, we will need a detailed transaction list of the shares sold, free rewards received, purchases, etc.

10. Did you make any federal and/or state estimated tax payments Yes No

If you answered yes, please provide individual dates/amounts of payments with your tax documents.

YOU MUST SIGN THE NEXT PAGE

