

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

Your Name: _____ Date: _____

- Spouse's Name (if applicable): _____
- Best phone number to reach you: _____
- Taxpayer DOB: _____ SSN _____
- Spouse DOB: _____ SSN _____
- Current Address: _____

Dependent Full Name	_____	DOB	_____	SSN	_____
Dependent Full Name	_____	DOB	_____	SSN	_____
Dependent Full Name	_____	DOB	_____	SSN	_____
Dependent Full Name	_____	DOB	_____	SSN	_____

ALL TAX RETURNS ARE 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 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 selected 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.

Check here if you would like us to send you a link to access our secure online TaxDome portal: _____

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

Bank Name _____

Account Number _____ Routing Number _____

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

3. Prior address if you moved in 2023 _____ Date of Move _____
If you moved, we will need a copy of the Closing Disclosure Statement or HUD1 document.

4. Did you have a Foreign Bank Account in 2023? Yes No

5. Are you a business owner or have rental property? Yes No
Do you file a separate tax return for your business or rental property? Yes No

6. 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.

7. **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 need a detailed transaction list of the shares sold, free rewards received, purchases, etc.

8. 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.

How did you hear about us? _____

Please Sign Back of Form

