



CLIENT INFORMATION WORKSHEET

PRIMARY NAME _____ SPOUSE NAME _____

SSN _____ BIRTHDATE _____ SSN _____ BIRTHDATE _____

OCCUPATION _____ OCCUPATION _____

EMAIL _____ EMAIL _____

PHONE _____ PHONE _____

ADDRESS _____ APT# _____

CITY _____ STATE _____ ZIP _____ DID YOU MOVE THIS YEAR? YES NO

DEPENDENTS

NAME	BIRTHDATE	SSN	RELATIONSHIP	MONTHS LIVED WITH YOU IN 2021

MISCELLANEOUS QUESTIONS

AMOUNT YOUR FAMILY RECEIVED IN STIMULUS PAYMENTS IN 2021: _____ or WE DID NOT RECEIVE A STIMULUS PAYMENT IN 2021.

DID YOU RECEIVE, SELL, SEND, EXCHANGE, OR OTHERWISE ACQUIRE ANY FINANCIAL INTEREST IN ANY VIRTUAL CURRENCY? YES NO

AMOUNT YOUR FAMILY RECEIVED IN ADVANCED CHILD TAX CREDITS: _____ or WE DID NOT RECEIVE ANY ADVANCED CHID TAX CREDITS.

LIVING ARRANGEMENTS

OWN: PROPERTY TAXES PAID IN 2021: _____

RENT: PAID: _____ FOR _____ MONTHS; LANDLORD OR COMPLEX: _____

PAID: _____ FOR _____ MONTHS; LANDLORD OR COMPLEX: _____

REFUND SELECTION

PAY FOR TAX PREP TODAY; RECEIVE TAX REFUND BY: IRS DIRECT DEPOSIT IRS CHECK

HAVE TAX PREP FEES DEDUCTED FROM YOUR REFUND (\$69 BANK FEE); RECEIVE TAX REFUND BY: DIRECT DEPOSIT DEBIT CARD CHECK

INFO FOR DIRECT DEPOSIT: CHECKING SAVINGS RTN _____ ACCT # _____

I CERTIFY THAT I WOULD LIKE MY TAXES PREPARED ACCORDING TO THE INFORMATION SUPPLIED ABOVE. ALL INFORMATION IS TRUE AND CORRECT AND I TAKE FULL RESPONSIBILITY FOR THE INFORMATION PROVIDED AND THE FINAL PRODUCT AS I DIRECT IT TO BE FILED.

SIGNATURE _____ DATE _____

SIGNATURE _____ DATE _____