

Client Information Sheet Tax Year 2022



Filed with our Firm Last Year

New Client

Date _____

① Primary Taxpayer

Full Name _____

Social Security # _____

Date of Birth: _____

Address _____

E-Mail _____

Preferred Phone # _____

Occupation _____

Is anyone claiming you as a dependent? _____
Y/N

② Spouse

Full Name _____

Social Security # _____

Date of Birth: _____

Address _____

E-Mail _____

Preferred Phone # _____

Occupation _____

Is anyone claiming you as a dependent? _____
Y/N

③ Marital Status

Single _____

Married Filing Joint _____

Married Filing Separate _____

Head of Household _____

Qualifying Widow(er) _____

④ Dependents

Name

Relationship

Date of Birth

Social Security #

Name	Relationship	Date of Birth	Social Security #
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

⑤ Dependent Care Expenses

Dependent's Name

Name & Address of Provider

EIN #

Amount Paid

Dependent's Name	Name & Address of Provider	EIN #	Amount Paid
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

⑥ Digital Currency

At any time during 2022, did you receive, sell, send, exchange or otherwise acquire any financial interest in any virtual currency? _____ YES (please elaborate below) _____ NO

7 College Expenses

Student's Name	Name & Address of College	EIN #	Amount Paid
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

8 Marketplace Health Coverage

Did anyone on your Tax Return purchase Health Insurance Coverage from the Marketplace through the website healthcare.gov?

YES _____ (Must provide Form 1095-A) NO _____

9 Refund Direct Deposit Information

If you receive a refund would you like it Direct Deposited into a Bank Account?

YES	NO

If you want Direct Deposit, please provide the following:

Name of Banking Institution	Routing #	Account #	Checking	Savings
_____	_____	_____	_____	_____

10 Payment for Services

_____ I will pay my Tax Preparation Fee at the time of completion

_____ I would like my Tax Preparation Fee deducted from my refund for an additional \$50 charge

11 Identification

We are required to maintain proof of your identity. Be sure we have a current copy of your Driver's License, a State-Issued ID Card, or a Passport.

12 Additional Information

If there are any special circumstances that you need to make us aware of, please use the space below:

13 Declaration of Responsibilities

In the event of an Audit, you will be responsible for documenting the deductions taken on your Tax Return. Be sure to keep all tax forms, receipts, check images, and/or proof of charitable contributions for at least 4 years. Taxpayers with Real Estate should keep property records for the life of ownership.

I certify that the information and statements provided on this form are true and correct to the best of my knowledge, and that I understand the record keeping requirements.

Signature

Date