

RETURNING Client Information Form for Tax Year 2019

(If you are not filling in this form online, please *use blue or black ink only and print legibly.*)

Taxpayer

Legal Name (first, MI, last): _____
Address: _____ Zip: _____
Field of employment: _____
Driver's License State: _____ Number: _____
Issue Date: _____ Expiration Date: _____
Do you want \$3 of your taxes to go to the Presidential Election Campaign Fund? Yes ___ No ___

Spouse

Legal Name (first, MI, last): _____
Field of employment: _____
Driver's License State: _____ Number: _____
Issue Date: _____ Expiration Date: _____
Do you want \$3 of your taxes to go to the Presidential Election Campaign Fund? Yes ___ No ___

Taxpayer Cell phone: _____
Spouse Cell phone: _____
Taxpayer Work phone: _____
Spouse Work phone: _____
Home phone: _____
Email address: Taxpayer: _____ Spouse: _____

If **Refund**, I/We would like to receive by: Automatic Deposit ___ or Paper Check ___

Bank Name: _____
Bank Routing Number: _____
Bank Account Number: _____
Checking ___ or Savings ___

If **Tax Due**, pay by: Automatic Debit ___ or Paper Check ___

Are dependents the same as last year? Yes ___ No ___ (*only note changes or new additions*)

NOTES: _____

Additional Dependent #1

Name: _____
Birth Date: _____
SSN: _____
Number of months lived with you in 2019: _____
Relationship: _____

Additional Dependent #2

Name: _____
Birth Date: _____
SSN: _____
Number of months lived with you in 2019: _____
Relationship: _____

If there are more than two changes to dependents, please write the additional ones on the back of this form.

What of state(s) are you resident(s)? _____ Dates of residency: _____

Did you have any crypto-currency transactions this past year? Yes ___ No ___

If so, please bring all of your records regarding these transactions.

Did you pay or receive Alimony this past year? Yes ___ No ___

If yes, ex-spouse's **legal** name, SSN, and date of divorce finalization: _____

I affirm that all typed/hand-written information on this checklist is correct to the best of my knowledge:

Signed: _____ Date: _____