

Please print **clearly**

Your information

First Name _____ Middle Initial _____

Last Name _____ Date of Birth _____

Social Security Number _____ Job _____

Drivers License Number _____ State _____

Issue Date _____ Expiration Date _____

Did you obtain health insurance coverage from the marketplace? Y / N

Did you invest in cryptocurrency? Y / N

Spouse's information (complete, even if filing separately)

First Name _____ Middle Initial _____

Last Name _____ Date of Birth _____

Social Security Number _____ Job _____

Drivers License Number _____ State _____

Issue Date _____ Expiration Date _____

Was health insurance coverage from the marketplace? Y / N

Current Address (PO Box not accepted)

Did you live anywhere else in 2019? Y / N

Primary phone number _____

2ndary phone number _____

Email _____

Dependents

First Name	_____	Middle Initial	_____
Last Name	_____	Date of Birth	_____
Social Security number	_____	Relationship	_____
First Name	_____	Middle Initial	_____
Last Name	_____	Date of Birth	_____
Social Security number	_____	Relationship	_____
First Name	_____	Middle Initial	_____
Last Name	_____	Date of Birth	_____
Social Security number	_____	Relationship	_____
First Name	_____	Middle Initial	_____
Last Name	_____	Date of Birth	_____
Social Security number	_____	Relationship	_____
First Name	_____	Middle Initial	_____
Last Name	_____	Date of Birth	_____
Social Security number	_____	Relationship	_____

Do you want your refund by check or direct deposit? If by direct deposit, please enter the account and routing number for each account you'd like your refund deposited to (the IRS allows you to specify up to 3 accounts and designate an amount to each). If blank, then your refund will be issued by check.

Routing	_____	Account Nmbr	_____
Routing	_____	Account Nmbr	_____
Routing	_____	Account Nmbr	_____

Do you have any unfiled returns or past-due tax obligations? Y / N

How will you pay for our services?

- Electronic invoice (pay online by check or credit card)
- Mail a check
- Credit/Debit card over the phone
- Withdraw fee from refund (additional fees apply)

Note: in accordance with our profession's standards returns will not be filed until fees for tax preparation services are paid

Did you receive your:

- First stimulus payment? Y / N (amount _____)
- Second stimulus payment? Y / N (amount _____)
- Third stimulus payment? Y / N (amount _____)

How else can we assist you?

- Tax planning
- Saving for retirement
- Life insurance
- Saving for education
- Other