

MM Tax Service, Inc.

— Maria A. Miguel, E.A. —

2023 CLIENT QUESTIONNAIRE

Personal Information

Taxpayer & Spouse Name: _____

	Taxpayer:	Spouse:
Email:	_____	_____
Phone:	_____	_____

Is your address the same as last year?

Yes No (if no, please provide your current address)

Address: _____

City: _____ State: _____ Zip: _____

Are you claiming the same dependents as last year?

Yes No N/A (if no, please list the dependents you are claiming)

Name:	SSN:	Birthdate:	Relationship:
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

- List SSN, Birthdate & Relationship only if new dependent (or you are a new client)

Check here if you are a new client and provide your SSN and birthdate.

	Taxpayer:	Spouse
SSN:	_____	_____
Birthdate:	_____	_____

Tax Refunds

Check here if you would like any refund(s) due you deposited directly to your bank account and provide a voided check or check an option below:

Bank account is the same as last year

Bank Name: _____ Checking or Savings

Routing Number: _____

Bank Account Number: _____

Tax Payments

If you owe tax, check here if you would like the amount due automatically withdrawn from your bank account and provide a voided check or check an option below:

Bank account is the same as last year

Bank Name:

Checking or Savings

Routing Number:

Bank Account Number:

If we set up estimated (quarterly) taxes for you for 2023, did you pay them as instructed per our letter?

Yes No *(if no, please supply the details of the payments you did make)*

If you owe estimated (quarterly) taxes for 2024, how would you like to pay them:

I will pay them online *(instructions will be supplied in your letter)*

Please have the payments automatically withdrawn from my bank account on each payment due date

Pay by Check *(we will supply payment coupons)*

Required Tax Return Questions

At any time during 2023, did you have a financial interest in or signature authority over a financial account located in a foreign country?

Yes No

At any time during 2023, did you (a) receive (as a reward, award, or payment for property or service; or (b) sell, exchange or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

Yes No

Did you or your family have health insurance for any part of 2023 through the Healthcare Exchange (Marketplace)?

Yes No *(If yes, we need your Form 1095-A to complete your tax return)*

Tax Return Signatures & Copies

As always, you are required to sign an authorization indicating that you have reviewed your tax return before we can electronically file your tax return. Please indicate below how you would like to sign your signature form and receive your tax return.

Electronically* *(if married, we need both spouse's email addresses)*

Paper Copy (Mail)

Paper Copy (Pick Up)

*If you choose electronic both you (and your spouse, if married) will receive two separate secure emails. The first email is to view **and download** your return and the second email will request your signature.

