

WHS Client Questionnaire

(please complete front and back of questionnaire)

Client Name(s) _____

Electronic Deposit/Payment Option IRS NO LONGER ISSUING PAPER CHECKS

Your refund **MUST BE** direct deposited. You still have the option to have your balance automatically withdrawn from your bank account.

If you receive a refund, please provide banking information. Your funds **MUST BE** direct deposited into your bank account. We will need a copy of a voided check to verify your bank information. ***Please do not send a deposit slip.***

If you have a balance due, would you prefer to have an **automatic withdrawal** from your bank account?

_____ Yes _____ No

Has your banking information changed from your last tax return preparation?

_____ Yes _____ No ***If YES, provide your tax preparer with your banking information***
_____ Received _____ To be received

Driver's License Information

Since your last tax return preparation, have you or your spouse updated your driver's license information?

_____ Yes _____ No ***If YES, please provide a copy of your driver's license***
_____ Taxpayer DL scanned _____ Spouse DL scanned

Check off the Information Applicable to Your Tax Situation

1. **Please provide PIN (if issued) by the IRS** _____
Returns requiring PINS will not be electronically filed without this number.

2. **Did you purchase and finance a new auto in 2025?**

_____ Yes _____ No

3. **Do you have a 529 plan you are not using that has been in existence for at least 15 years?**

_____ Yes _____ No

4. **Foreign Bank account owner or signature authority**

_____ Yes _____ No

5. Digital Assets (cryptocurrency) *Must have spreadsheet(s) from digital wallet(s)*

At any time during 2025, did you

- a) Receive (as a reward, award, or compensation) OR
- b) Sell, exchange, gift or otherwise disperse of a digital asset (or a financial interest in a digital asset?)

Yes No

6. If you are a Maryland resident, do you have a higher education debt from a MD institution?

Yes No

7. If you receive overtime or tips, please provide paystub.

Client Signature

Date