

# 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 You still have the option to have your balance automatically withdrawn from your bank account.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

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## **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

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## **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 \_\_\_\_\_