

LML Tax & Accounting Services, LLC
Client Information & Update Questionnaire

***** Please complete and return with tax documents! *****

	YES	NO
Did your contact information change? Phone number? E-mail? Address? Provide details on back.	_____	_____
Did you receive an Identity Protection PIN from the IRS? Please provide the IRS letter received.	_____	_____
Do you want direct deposit? Please provide a copy of a voided check.	_____	_____
At any time during 2022 did you receive, sell, exchange, or otherwise dispose of any financial interest in virtual currencies? Provide details.	_____	_____
Do you have a financial interest in, or signature authority over a bank account, securities account, or other financial account in a foreign country?	_____	_____
Were there any changes in dependents from the prior year? For example, graduation followed by full-time employment, new birth or adoption. Please details on back.	_____	_____
Do you have any children under age 19 or full-time student under age 24 with unearned income in excess of \$2,200?	_____	_____
Do you have dependents who must file a tax return?	_____	_____
Did you or your spouse receive dependent care benefits as reported on a W2?	_____	_____
Did you pay for child or dependent care so you could work or go to school? Provide statement from childcare center	_____	_____
Did you have any educational expenses or student loan interest during the year?	_____	_____
Did you make any contributions to an ABLE or 529 Plan account?	_____	_____
Did you have any debt cancelled or forgiven?	_____	_____
Did you start a new business or farm, purchase rental property, or acquire an interest in a partnership or S corporation during the year?	_____	_____
Did you purchase, sell, or refinance a principal residence or second home, or take a home equity loan? Provide details of use of funds.	_____	_____
Do you have evidence to substantiate charitable contributions? Please provide a summarized list.	_____	_____
Did you convert part or all of a traditional, SEP, or SIMPLE IRA to a Roth IRA?	_____	_____
Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(K), or other plan?	_____	_____
Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act? Provide any Form(s) 1095-A you received.	_____	_____
Did you take any distributions from a retirement account? IRA, SEP, 401k, Pension	_____	_____
Did you have any beneficial ownership in a business entity?	_____	_____
Do you have an inactive LLC or other business entity?	_____	_____
Did you receive any 1099's during the tax year?	_____	_____
Did you make any new energy-efficient improvements to your home?	_____	_____
Did you purchase a new energy-efficient car, truck, or van?	_____	_____
Did you receive any notices or letter from any government tax agency - federal, state or local? Please provide a copy	_____	_____
Did you make or receive any alimony payments during the tax year for settlement prior to 2019?	_____	_____
Did you have any change in employment during the tax year?	_____	_____
Did you have any gambling winnings? If yes, also provide losses.	_____	_____

***ALERT* You may need to log into your client accounts and download forms if not received in mail.**

Did you make any estimated payments:

	IRS	PA	NJ	Local
1st Qtr	_____	_____	_____	_____
2nd Qtr	_____	_____	_____	_____
3rd Qtr	_____	_____	_____	_____
4th Qtr	_____	_____	_____	_____

Changes and Updates

Marital status change: _____

Newly married - Name, SS#, DOB: _____

Newly divorced – If yes provide effective date or move out date: _____

Address change: _____

Date moved: _____

Phone # Change: _____

Address Change: _____

Any other important information you would like to communicate: _____
