**Client Information**

**\*\*Annual Client Update is IRS Mandated\*\***

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| ***Received Date:*** Click or tap to enter a date.  **New Client  If new, prior yr return included**  Choose an item. | ***Tax Year:***  Click or tap to enter a date. |

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| ***Business name***  Click or tap here to enter text. | | | | |
| ***EIN***  Click or tap here to enter text. | | | ***Office Phone*** | |
| ***Owner Last Name***  Click or tap here to enter text. | ***First Name, MI***  Click or tap here to enter text. | |  | |
| ***Mobile Phone***  Click or tap here to enter text. | ***Home Phone***  Click or tap here to enter text. | | ***Email***  Click or tap here to enter text. | |
| ***Address***  Click or tap here to enter text. | | | | |
| ***City***  Click or tap here to enter text. | | ***State***  Click or tap here to enter text. | | ***Zip*** |

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| ***Filing Status:***  Choose an item. | ***Banking Information***  *N/A*  *Bank*: Click or tap here to enter text.  *Rtg*: Click or tap here to enter text.  *Acct*: Click or tap here to enter text.  *Password*: Click or tap here to enter text.  (If applicable for electronic access) |
| ***Passwords:*** *N/A*  **QB:** Click or tap here to enter text.  **Other:** Click or tap here to enter text.  **Other:** Click or tap here to enter text. |
| ***Client return copies (Choose one)***  Choose an item. |
| ***Client Data:***  ***My original documents:  NA/portaled ☐ Destroy ☐ Pick Up ☐ Mail - $25 Fee  Portal copies***  ***I understand that Taxico Financial will not keep my original documents. Upon 31 days from contact date that file is complete, my originals will be destroyed following IRS mandates for destruction of personal documentation. If this box is left unchecked, I will not receive my original documents back and they will be destroyed following IRS mandates of destruction of personal documents*** | |

**I certify that I have reviewed the information above, and it is correct to the best of my knowledge. *Failure to complete this form will cause delays in processing my return.***

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|  | Click or tap to enter a date. |

***Client Signature* *Required***