## New Client?:

and reprint fees/ amending calculations.

Todays Date: \_

# **Client Information Form Tax Year 2023**

# Which tax preparer do you prefer? Check one:

Bart	Craig	Rochelle	No Preference/ First Available		
1) Primary Tax	Payer Info		2) Spouse Info		
Full Name			Full Name		
SSN (last 4 digits f	or existing clients)	DOB	SSN (last 4 digits for existing client) DOB		
Mailing Address (if new client or you moved)			Mailing Address (if different from tax payer)		
City	State	Zip Code	City State Zip Co		
Phone Number			Phone Number		
E-Mail Address			E-Mail Address		
Occupation Title (if new client or changed jobs)			Occupation Title		
Drivers License #	t (if new client OR ex	oired in 2023)	Drivers License # (if new client OR expired in 2023		
Issue Date	Expir	ation Date	Issue Date Expiration Date		
O Married- Separate O Head of Household			<b>Direct Deposit Information for Refunds:</b> If your account # is the same as last year, please write the last four digits here:		
Can anyone claim	you as a dependent?	○ Yes ○ No	Account # (if new): Routing #:		
<mark>.Q:</mark> Why do I have	e to fill this out every	year?	Name of BanK: Checking Account		
	is part of our due di cessary in avoiding c	-	•		

# WHEN DROPPING OFF YOUR PAPERWORK, PLEASE HAVE YOUR TAX DOCUMENTS READY AND OUT OF THEIR ORIGINAL ENVELOPES. THANK YOU!

3) Dependents: List the names of ONLY the dependents you can claim & check the box next to their name if they are a full time college student.

Name:	Student:	Relationship: (if new depende	nt) SSN: (if new dep.	) DOB: (if new dep.)
	С	)		
	С	)		
	С	)		
	С	)		
	С	)		
	С	)		

### 4) Your Income Tax Situation: Select all that apply to you or your spouse.

Do you rent your home or own your home? () Rent () Own

**Income Sources:** 

🔿 W2 Income -	List # of	W2 forms:
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- O Unemployment
- Social Security Income
- Retirement/ Pension
- Interest Income
- O Dividends
- ◯ Stock Sales
- Self Employment Income/ 1099-NEC (Be sure

- Self Employment Tax)
- Rental Property
- Virtual Currency

○ Gambling winnings of \$600 or more

#### Household / Dependents:

College tuition (must provide 1098-T form) Paid student loan interest (1098-E form) C Enrolled in a health insurance plan through Covered CA or the exchange market place (must provide 1095-A & 3895 form) Paid for child care/ daycare (if you checked this) box, and did not enclose a form with information, please list the amount paid, name, address, and to include a list of expenses to help decrease your EIN or SSN of the provider you use under the comment section) **Miscellaneous:** ○ Sold or purchased a home (must provide final closing cost statement)

• Paid or received alimony prior to Jan. 1, 2020

O Purchased a brand new electric vehicle or solar panels (must provide year, make, & model of vehicle and purchase price of solar panels.)

Your Signature:

We will contact you if we have any questions or suggestions regarding your income tax situation. If you would like a phone call to discuss specific matters while we are working on your return, please briefly list your questions or concerns below, as well as your phone number and the best time to call.

Phone # \_\_\_\_\_\_ Best Time to Call: \_\_\_\_\_\_

Comments, questions, or notes you have for us:

By signing, you recognize that you have thoroughly read through this form and if items were left off after your final tax return has been completed, you may be subject to a re-print fee.

Thank you for your continued business! We greatly appreciate you and hope you have a wonderful and healthy year.

Date: