



EUBANKS TAX SERVICE

Client Update Sheet

Please fill out this form and return it to the front desk with your government-issued ID.

Please also present the government-issued ID for your spouse and proof of residency for any dependents

Client Verification

Name: _____

Date: _____

Client Information Sheet Review

Have you had any changes to your tax profile since your last visit? *(examples are on the back of this sheet)*

☐ No changes

☐ My updates are written on the back of this page.

Services

☐ Tax Return

☐ Consultation

☐ I am dropping off

*If you are requiring services for a **new** corporation, partnership, estate, or other regarded entity, please ask us for a Business Information Sheet.*

Have any of the following changed for you (and, if applicable, your spouse):

☐ Updated driver's license

☐ Daycare or college

☐ Non-W2 earnings or military service

☐ Name, address, phone number, email

☐ Add or remove dependent

☐ Retirement and/or social security

☐ Marriage, separation, divorce, widow/er

☐ Inheritance or large monetary gifts

☐ Direct deposit information

Item Description	Updated Information

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