**Essix Tax Client Data Sheet for**

**Returning Clients**

**The Essix Group - 2536 Mangum Street - Commerce, Texas - 75428**

**Client Data Documentation**

I \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ , do attest under penalties of perjury, and to the best of my knowledge, that the information contained in the most recent client data sheet has not changed. This includes all pertinent information for processing my income tax return such as:

* Filing Status
* Dependents
* Dependent Care
* IRA Contributions
* Educational Expenses
* Identity Protection (PIN), etc.

**\*In 2023, did you receive, exchange, or sell any digital asset? i.e. Non-fungible tokens (NFTs), Cryptocurrencies (such as Bitcoin) or Stablecoins (such as Tether) currency? Yes/No**

**\*Are you in default on student loans or delinquent on child support or back taxes?** **Yes/No**

**\*Did you purchase health insurance through the Marketplace?** **Yes/No**

**\*Did you make energy-saving improvements to your home? Yes/No**

***Energy efficient home improvements examples* *Residential clean energy examples***

**Insulation Solar electric property costs**

**Exterior windows and doors Solar water heating property costs**

**Central air conditioners Fuel cell property costs**

**Water heaters Small wind energy property costs**

**Heat pumps Geothermal heat pump property costs**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Taxpayer’s Signature Date