

Essix Tax Client Data Sheet for Returning Clients

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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 2025, 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

Insulation
Exterior windows and doors
Central air conditioners
Water heaters
Heat pumps

Residential clean energy examples

Solar electric property costs
Solar water heating property costs
Fuel cell property costs
Small wind energy property costs
Geothermal heat pump property costs

Taxpayer's Signature

Date

ALL FEES ARE DUE UPON THE COMPLETION OF TAXES UNLESS CHOOSING TO HAVE THOSE FEES WITHHELD FROM REFUND. Contractual Agreement Required.