

"2023" RETURNING CLIENT

Name: _____ SSN: _____

Spouse: _____ SSN: _____

(ALL MARRIED FILING SEPARATELY OR HEAD OF HOUSEHOLD FILERS, WHETHER A NEW CLIENT OR A RETURNING CLIENT, MUST ALSO COMPLETE THE BACK OF THIS FORM EVEN IF THERE HAVE BEEN NO CHANGES!)

IMPORTANT: (Must be answered for all clients)

Foreign Accounts, Virtual Currency

Do you have any foreign accounts, investments or virtual currency transactions? YES NO

If yes, please explain: _____

Health Insurance

Do you have health insurance through the Affordable Care Act? (Obama Care) YES NO

If yes, please provide form 1095-A

CHANGES ONLY: If no other information has changed, the following can be skipped. If changes, please indicate below.

Marital Status: Single Married Head of Household Married Filing Separately

Mailing address: _____

Email address: _____

Dependents:

Add: _____ **Remove:** _____

Add: _____ **Remove:** _____

Filing status, if changed: Single Married Head of Household Married Filing Separately

If Married Filing Separately or Head of Household, filers must also complete the back.

Are we using the same direct deposit/ bank account as we did last year? YES NO

*If no, please provide a voided check.

Other Changes: _____

Please provide a copy of your updated driver's license and a copy of social security card(s) and birth certificates for any dependents that you are adding this year.

* **Would you like your copy of your tax return digital, paper, or both? Provide email above.**

More on Back...

If Married Filing Separately or Head of Household:

- Have you lived with your spouse for the last 6 months of the year? YES NO
- Have you lived with your spouse one day during the past year? YES NO

Filing Status – Head of Household

The IRS could require additional information/documentation if you are divorced, legally separated, or married and did not reside with your spouse the last 6 months of the year to determine if you qualify for the head of household filing status.

1. Marital Status:
 - a. Never married
 - b. Spouse deceased
 - c. Divorced, separated
 - d. Married but lived apart from spouse during the last 6 months of the year
 - e. Separation agreement

2. If you are divorced or legally separated, can you provide the IRS with any of the following documents?
 - a. Divorce decree – Date: _____
 - b. Separate maintenance agreement or separation agreement – Date: _____

3. If you are married but did not reside with your spouse for the last 6 months of the tax year, can you provide the IRS with any of the supporting documents verifying that your spouse did not live with you?
 - a. Not applicable
 - b. Lease agreement
 - c. Utility bills
 - d. Letter from a clergy member
 - e. Letter from social services
 - f. Other supporting documentation

If so, what type of documentation? _____

4. Can you provide the IRS with receipts and bills substantiating the cost of maintenance more than half of the cost of the home? Documentation that the IRS requires to substantiate the cost of maintaining the home includes:
 - a. Utility bills
 - b. Rent receipts or mortgage interest statement
 - c. Property tax bills
 - d. Maintenance and repair bills
 - e. Grocery receipts
 - f. Other household bills

5. Did you receive any non-taxable support/income?
 - a. Family support
 - b. Childcare assistance
 - c. Food stamps
 - d. Housing assistance

Other: _____