

CLIENT INFORMATION SHEET

Date: _____

Referred By: _____

Taxpayer Name: _____

Spouse Name: _____

Address: _____

Address: _____

(if different) _____

Social Security #: _____

Social Security #: _____

Date of Birth: _____

Date of Birth: _____

Phone Number: _____

Phone Number: _____

Email Address: _____

Email Address: _____

Occupation: _____

Occupation: _____

DEPENDENTS:

Name: _____

Name: _____

Social Security #: _____

Social Security #: _____

Date of Birth: _____

Date of Birth: _____

Grade in School: _____

Grade in School: _____

Lives in household of taxpayer? Y / N

Lives in household of taxpayer? Y / N

Name: _____

Name: _____

Social Security #: _____

Social Security #: _____

Date of Birth: _____

Date of Birth: _____

Grade in School: _____

Grade in School: _____

Lives in household of taxpayer? Y / N

Lives in household of taxpayer? Y / N

Did you have any interest in or authority over any foreign account
or trust.

____ Yes ____ No

(Continue to Page 2)

At any time during 2024, did you: (a) receive as a reward, or payment for

property or services, or (b) sell exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? ☐ Yes ☐ No

Are you currently enrolled in any higher education programs. ☐ Yes ☐ No

Did you receive a 1098T for your higher education. ☐ Yes ☐ No

Do you have any expenses not paid by tuition for books related to you higher education. ☐ Yes ☐ No

Are you currently in repayment of student loans. ☐ Yes ☐ No

Are you a US citizen and/or resident alien. (You are a resident Alien for a calendar year if you meet the green card test or the Substantial presence test for the year. ☐ Yes ☐ No