

**QUESTIONS FOR THE PREPARATION
OF YOUR 2024 TAXES**

NAME _____ DATE _____

DO WE HAVE PERMISSION TO TEXT THE PHONE NUMBER WITH QUESTIONS, UPDATES AND WHEN YOUR TAX RETURN IS READY FOR PICK UP? ____ YES ____ NO

PHONE NUMBER: _____ EMAIL ADDRESS _____

CELL PHONE NUMBER: _____

DRIVERS LICENSE

Driver's License # _____ Driver's License # _____

Date of Issue _____ Date of Issue _____

Date of Expiration _____ Date of Expiration _____

ARE YOUR DEPENDENTS THE SAME? YES OR NO
(NEW DEPENDENT PLEASE FILL OUT INFO BELOW)

DEPENDENTS NAME: _____

SOCIAL SECURITY NUM: _____

DATE OF BIRTH: _____

ARE ANY DEPENDENTS DISABLED? YES OR NO

IF YOU PURCHASED ANY OF THE FOLLOWING WE WILL
(NEED \$ AMOUNT) \$ _____
A NEW HOT WATER HEATER, FURNACE, WINDOWS,
ROOF, INSULATION, DOORS, SOLAR PANELS OR ELECTRIC

DO YOU HAVE DEPENDENTS IN COLLEGE? _____ **(IF YES, WE NEED 1098T)**

IS YOUR ADDRESS THE SAME? YES OR NO

NEW ADDRESS: _____

DATE OF MOVE: _____

IS MARITAL STATUS THE SAME? YES OR NO, if NO fill in info

SPOUSE NAME: _____

SSN: _____ DOB: _____

Date of Marriage: _____

DATE OF DEATH: _____

DATE OF DIVORCE: _____

DID YOU RECEIVE, SELL, SEND, EXCHANGE OR ACQUIRE ANY VIRTUAL CURRENCY?

BITCOIN

CYBERCURRENCY

CRYPTOCURRENCY

DIGITAL CURRENCY

DIGITAL WALLET

TO THE BEST OF YOUR KNOWLEDGE DO WE HAVE ALL OF YOUR TAX INFORMATION TO PROCEED WITH YOUR TAXES?
____ YES ____ NO

**THE DIRECT DEPOSIT INFORMATION MUST BE PROVIDED ON THIS FORM IN ORDER TO
RECEIVE DIRECT DEPOSIT REFUNDS –
EVEN IF THE INFORMATION WAS PROVIDED IN PRIOR YEARS**

DIRECT DEPOSIT: BANK: _____ CHECKING ____ SAVINGS ____

RTN # _____ ACCT # _____

Signature _____ Referred by _____