New Client Questionnaire

Please check the appropriate box and include all necessary details and documentation

Taxpayer Information:

Name:_____

DOB:_____ SSN/TIN:_____

Phone Number:_____

Email:_____

Street:_____

City:_____ State:_____ Zip:_____

Spouse Information:

Name:_____

DOB:_____ SSN/TIN:_____

Phone Number:_____

Email:_____

Street:_____

City:_____ State:_____ Zip:_____

What is your martial status?:_____

	Yes	No
Did your martial status change during the year? If yes, explain: _____	☐	☐

_____

Can you be claimed as a dependent by another taxpayer?	☐	☐
Did you change any bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year?	☐	☐

If yes, enter new account information:

Routing #:_____

Account #:_____

Dependent Information:

Were there any changes to dependents from last year? If yes, explain: ☐☐

_____

_____

Do you have dependents who must file a tax return? ☐☐

Did you provide over half the support for any other person(s) last year? ☐☐

Additional Questions:

Did you retire or change jobs this year? ☐☐

Did you, your spouse, or your dependents attend a post-secondary school during the year or plan to attend one in the coming year? ☐☐

Purchase, Sale and Debit Information:

Did you start a new business or purchase rental property last year? ☐☐

Did you sell, exchange or purchase any real estate last year? ☐☐

Did you purchase or sell a principle residence last year? ☐☐

Did you have any debts canceled or forgiven last year? ☐☐

Did you pay any student loan interest last year? ☐☐

Did you gain or lose any digital assests? ☐☐

Any additional Information you would like us to know:

_____

_____

_____

_____

_____

_____

_____

_____

New Client Questions:

Dependent children claiming

Name:_____ DOB:_____ Social:_____

Name:_____ DOB:_____ Social:_____

Name:_____ DOB:_____ Social:_____

Name:_____ DOB:_____ Social:_____

Name:_____ DOB:_____ Social:_____

Name:_____ DOB:_____ Social:_____

	Yes	No
Did you provide over half of the support for the above dependents?	☐	☐
Do you have any children under the age of 18 who received unearned income(Interest, dividends, investments) of over $1,900?	☐	☐
If you are divorced or separated with children, do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities?	☐	☐