**Walrath Tax Service LLC -Updated information 2024**

**For Students**

**Client Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Name you go by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Mailing Address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_City\_\_\_\_\_\_\_\_\_\_\_\_\_State\_\_\_\_Zip\_\_\_\_\_\_\_\_\_**

**Physical address(If Different from above) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**(County)\_\_\_\_\_\_\_\_(School District) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Phone #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Best Email address to use \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**~Are you being claimed, by parent or guardian? \_\_\_\_\_\_**

**~Were you in college or high school in 2024? \_\_\_\_\_\_\_\_\_**

**~Do you have a 2025 IRS IP PIN Number? \_\_\_\_\_\_\_\_\_\_ (either in the mail or online)**

**~Did you have unemployment? Y\_\_\_\_\_ N\_\_\_\_\_\_ (You will need form 1099G)**

**~Did you have any virtual currency (Bought, Sold, Exchanged)?**

**~If you get a refund and want Direct Deposit, we will need, unless we already have it:**

**Bank Name\_\_\_\_\_\_\_\_\_\_\_\_ Routing #\_\_\_\_\_\_\_\_\_\_\_ Account #\_\_\_\_\_\_\_\_\_\_\_\_**

**If you owe money, do you want to do Pay online or Mail Check**

**~Do you have a Driver’s License/ Permit? \_\_\_\_\_**

**If so, we need a copy front and back, if we don’t have a current copy on file.**

**Checklist (most Common)**

**\_\_\_\_W2’s \_\_\_1099s \_\_\_\_Interest statements \_\_\_\_ Brokerage statements** **(Robinhood, Fidelity, Schwab, etc)** **(Need full statements- uploading them is appreciated)**

**\*\*\*Payment options for our services: Card, Check or Cash (preferably check or cash)**