**Walrath Tax Service LLC -Updated information 2021**

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

**Has your address changed? (Y OR N) What is it? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**(School District) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
  
Has your phone number(s) changed? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Best number to reach you at? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Best Email address to use \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Any Major changes (marriage/divorce, kids, college, bought house, retired…. etc.) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  
**Has you or your spouses’ occupation changed? \_\_\_\_\_\_\_**

**Did you receive the stimulus …? Y or N       If so, How Much- March 2021\_\_\_\_\_\_**

**Do you have Property taxes, if so, we need the statement?**

**Did you make any monetary Charitable donations? (Y or N) If Yes, Amount $\_\_\_\_\_\_\_\_\_\_\_\_**

**Did you have unemployment? (If so, please print off statement 1099G (from Dept of Labor website)**

**Did you receive the early Child tax credit or opt out of it? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Do you have any virtual currency? (Bought, sold, exchanged)**   
  
For Direct Deposit or Direct Debit, (for IRS or State Taxes) please provide bank account information? (if new please provide voided check or copy of check) **(savings or checking)**  
  
**Routing # \_\_\_\_\_\_\_\_\_\_\_\_ Account #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Bank Name\_\_\_\_\_\_\_\_\_\_\_\_**

**If You owe money to the IRS or NYS, how do you want to pay- Mail check, IRS Website or directly taken out of your account? (Circle one)**   
  
**Has your Driver’s license expired or changed (i.e....renewed, enhanced, lost…etc.?) If so, we need a copy of your Driver’s License (FRONT AND BACK)**