

# Walrath Tax Service LLC -Updated information 2023

## For Students

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

Mailing Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

(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 2023? \_\_\_\_\_

~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 Direct Debit, 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

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