



Name: _____
 Phone #: _____
 Email Address: _____

Did you move at any time during the year? If yes, please provide dates: If yes, new mailing address:	Yes	No
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Did you get married, divorced, or have a child during the year? If yes, Spouse's name, birthday, ssn? If yes, Child's name, birthday, ssn?	Yes	No
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Did any of your children graduate high school during year? Note: If in college or trade school, we need copy of Form 1098-T	Yes	No
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Did any of your children graduate college during year? What was date of graduation? Note: If in college or trade school, we need copy of Form 1098-T	Yes	No
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Would you like to e-file and direct deposit? Note: We will need copy of voided check (not deposit slip) if not on file	Yes	No
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Would you like to receive a secure, free electronic return copy immediately upon completion? Note: Generally, this reduces processing time by average of 5 business days. We need your email address and will send you means to pay your invoice securely, electronically as well.	Yes	No
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Did you make any: Federal Estimated Payments?	Yes	No
Did you make any: State Estimated Payments?	Yes	No
Did you make any: Local Estimated Payments?	Yes	No
Note: We will need dates and amounts paid for each one.		

Did you have healthcare via Exchange (Obamacare)? Note: We will need copy of Form 1095 (especially Form 1095-A)	Yes	No
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Did you invest in any crypto currency during year (Bitcoin etc)? Note: We will need information on any sales or exchanges made	Yes	No
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Did you make at least \$300 in charitable contriibs during year?	Yes	No
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Did you receive advanced child tax credits during year? Note: We will need to see copy of IRS Letter 6419 (need amount received)	Yes	No
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Are these all of your tax documents? Note: Please indicate if more information is forthcoming	Yes	No
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Helpful comments:

The above information is true and correct (please feel free to use back for any comments/notes):

Signature/Date: