



**Smith
Accounting
Services**

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CLIENT QUESTIONNAIRE

(RETURN WITH TAX DOCUMENTS)

Name: _____ Spouse: _____

E-Mail: _____ Spouse: _____

Cell Phone: _____ Spouse Cell: _____ Home Phone: _____

1. Select how you would like your copy of your completed Tax Return:

☐ Paper Copy ☐ E-Mail ☐ USB Flash Drive ☐ No Copy Needed

2. How do you prefer that we let you know that your Tax Return is completed (**Text** is encouraged):

☐ Text ☐ E-Mail ☐ Phone

3. Did you move or have a change of address during the year?

- a. If yes, please provide your updated address.

Address _____

City _____ State _____ Zip _____

4. If you are entitled to a refund, would you prefer your refund be Directly Deposited:

☐ YES - Direct Deposit ☐ NO - Paper Check

5. If you owe Taxes, would you want to have them paid electronically with the filing of your Return?

☐ YES ☐ NO – Provide Payment Voucher

- a. Complete the following if you selected **YES** on 4 or 5 above.

Account type: ☐ Checking ☐ Savings

Routing Number: _____ Account Number: _____

6. Did you or your spouse renew your drivers license during the year? ☐ YES ☐ NO

- a. If YES, please provide a copy of your driver's license with Tax Documents.

7. Will you be claiming any Dependents on your Tax Return? ☐ YES ☐ NO

- a. If YES, please complete the Dependent Form on Back

Signature: _____

Date: _____

Print Name: _____

DEPENDENT QUESTIONNAIRE

Dependent 1: Name: _____ DOB: _____
Relationship: _____ Social Security #: _____

Dependent 2: Name: _____ DOB: _____
Relationship: _____ Social Security #: _____

Dependent 3: Name: _____ DOB: _____
Relationship: _____ Social Security #: _____

Dependent 4: Name: _____ DOB: _____
Relationship: _____ Social Security #: _____

1. Is the Child unmarried?

Dependent 1: ☐ YES ☐ NO Dependent 2: ☐ YES ☐ NO
Dependent 3: ☐ YES ☐ NO Dependent 4: ☐ YES ☐ NO

2. Did the Child live with taxpayer over half the year?

Dependent 1: ☐ YES ☐ NO Dependent 2: ☐ YES ☐ NO
Dependent 3: ☐ YES ☐ NO Dependent 4: ☐ YES ☐ NO

3. Can another taxpayer claim the child?

Dependent 1: ☐ YES ☐ NO Dependent 2: ☐ YES ☐ NO
Dependent 3: ☐ YES ☐ NO Dependent 4: ☐ YES ☐ NO

4. A taxpayer may not claim the Child Tax Credit if the child has not lived with the taxpayer for over half the year, even if the taxpayer has supported the child, unless the child's custodial parent has released a claim to the exemption for the child.

Based on this Rule are you still eligible to claim the Child Tax Credit? ☐ N/A

Dependent 1: ☐ YES ☐ NO Dependent 2: ☐ YES ☐ NO
Dependent 3: ☐ YES ☐ NO Dependent 4: ☐ YES ☐ NO

5. If the taxpayer is divorced or a separated parent (or parents who live apart), the custodial parent must release the right to claim the child as a dependent to the noncustodial parent and will need to fill out Form 8332.

If you are a noncustodial parent claiming the child as a dependent, have you obtained the Form 8332 from the custodial parent? ☐ N/A

Dependent 1: ☐ YES ☐ NO Dependent 2: ☐ YES ☐ NO
Dependent 3: ☐ YES ☐ NO Dependent 4: ☐ YES ☐ NO

6. If claiming Head of Household, were you considered unmarried the last day of the tax year?

☐ YES ☐ NO ☐ N/A

Signature: _____

Date: _____

Print Name: _____