

# NEW TAX CLIENT FORM

## PERSONAL

NAME: \_\_\_\_\_

PHONE NUMBER \_\_\_\_\_

Email: \_\_\_\_\_

## HEALTH INSURANCE

1. Did you purchase individual health insurance coverage through the healthcare.gov? If so, did you receive a 1095A form?

## IDENTITY THEFT

1. Have you been notified of identity theft involving your income taxes for the past 3 years?
2. If you have had identity theft, did you receive a personal PIN number from the IRS?

## TAXES

1. Are there any changes in your filing status/ or dependents? If so, please list them below.

a. Filing Status: \_\_\_\_\_

b. Dependents: \_\_\_\_\_

If you are to receive a refund do you want your refund to be mailed or direct

2. deposited into your account? If you would like your refund direct deposited please provide us with your bank account information below.

Rt# \_\_\_\_\_ Acct# \_\_\_\_\_

## ELECTRONIC CURRENCY

1. Have you used any forms of electronic currencies this past year? Such as; Bitcoin, Ethereum, or Stellar. \_\_YES \_\_NO

THANK YOU!!