

## 2022 TAX RETURN CLIENT UPDATE: PLEASE PRINT LEGIBLY

Please provide a copy of your Driver's License as it is required for electronic filing.

### Taxpayer Information

### Spouse Information

Name (as appears on  
Social Security Card)

\_\_\_\_\_

\_\_\_\_\_

Street Address

\_\_\_\_\_

\_\_\_\_\_

City, State, Zip Code

\_\_\_\_\_

\_\_\_\_\_

SSN

\_\_\_\_\_

\_\_\_\_\_

Date of Birth

\_\_\_\_\_

\_\_\_\_\_

Cell Phone #

\_\_\_\_\_

\_\_\_\_\_

Phone #2

\_\_\_\_\_

\_\_\_\_\_

Email address

\_\_\_\_\_

\_\_\_\_\_

Dependents: Name, SSN, Birthdate (*If Necessary*)

**Dependent 1:** \_\_\_\_\_

**Dependent 2:** \_\_\_\_\_

**Dependent 3:** \_\_\_\_\_

**Dependent 4:** \_\_\_\_\_

### BRIEF QUESTIONNAIRE

Thanks for your time, with your help we can better accurately prepare your returns!

### FOR 2022 (Please Circle One)

1. Do you prefer to receive a digital copy of your return through our portal? **Yes No**

If so, do you also want a printed copy? **Yes No**

2. Would you like a tax organizer next year? **Yes No**

If so, do you want to receive it via: **Portal Email Mail**

3. Would you like to be included in our weekly newsletter? **Yes No** (If so, make sure your email address is above.)

4. Did you have health insurance through the **Marketplace** at all during the year? **Yes No**

5. Did you receive a tax notice within the last year? **Yes No**

6. Did you contribute to an **IRA** for 2022? **Yes No**

7. Did you pay **student loan interest** during the year? **Yes No**

8. Did you have a child attending a **private school** or who is **home schooled**? **Yes No**

9. Did you contribute to a **College Choice 529 Plan**? **Yes No**

10. Did you have a **parent living with you**, providing over half of their support/medical bills? **Yes No**

11. Did you have **financial interest** in a **foreign financial account(s)** totaling over \$10,000? **Yes No**

12. Did you buy or sell **virtual currency (Bitcoin, Ethereum, etc) and/or NFTs**? **Yes No**

13. Would you like an income tax projection later in the year (this is a billable engagement)? **Yes No**

\* If you answered **YES** to any of the questions above, we may require additional year end forms or information to accurately complete your return.