

CLIENT INFORMATION SHEET

(Please complete a separate sheet for each individual we are preparing a tax return for)
(You may also upload this document to your client portal)

| | |
|---------------|--|
| Taxpayer Name | |
| Address | |
| City, State | |
| Phone Number | |
| Email Address | |

If your current address is different from your prior year's tax return, please document the date of move: _____

Did you have a change in marital status in 2025? If so, please indicate the date of the change and the status:

Date of change: _____ Married Divorced Widowed

Did you gain new Dependents in 2025? If yes, please provide the following:

Name _____ SSN: _____ DOB: _____

Name _____ SSN: _____ DOB: _____

Did you receive an Identity Protection Pin? If so, please provide the name & pin number:

Name: _____ Pin #: _____

Driver's License Information:

| Name | Issuing State | ID # | Issue Date | Expiration Date |
|------|---------------|------|------------|-----------------|
| | | | | |

Crypto Transactions: At any time during 2025, did you: (a) receive crypto as a reward, award, or compensation; or (b) sell, exchange, gift, or otherwise dispose of a digital asset? YES NO

MANDATORY-Direct Deposit: The IRS has discontinued issuing paper check refunds. All refunds are now processed via direct deposit, and a valid bank account is required.

| | | |
|---------------------------------|----------|---------|
| Type Account (circle selection) | Checking | Savings |
| Routing Number | | |
| Account Number | | |

Delivery Options:

- Pick up completed return at our office
- Mail completed return (additional shipping/handling fee of \$25)