

CLIENT INFORMATION SHEET

(Please complete and include with tax documents for each tax filer)
(You may also upload this document to your client portal)

Taxpayer Name	
Address	
City, State, ZIP	
Phone Number	
Email Address	

DRIVER'S LICENSE INFORMATION: Please include a copy of your driver's license or state ID for **each family member that is filing a tax return** or complete the information below:

Name	Issuing State	ID #	Issue Date	Expiration Date

CRYPTO TRANSACTIONS: At any time during 2024, 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

DIRECT DEPOSIT OPTION: Would you like to direct deposit your refund
YES NO

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

CLIENT COPY OF TAX RETURN: (Please select an option)

- Digital copy in client portal
- Paper copy with client folder

DELIVERY OPTIONS: Pick up completed return at our office
 Mail completed return (additional shipping/handling fee of \$15)

NOTES FOR PREPARER: Please list any additional details that will assist the preparer.
(Did you move, any new dependents, changes to filing status, etc...)