

Returning Client Update Information

PLEASE INCLUDE WITH TAX DOCUMENTS

DROP OFF only _____ OR Date of scheduled appointment: _____, 2022

Name: _____ Date: _____

Did you move in 2021? No _____ Yes _____ If Yes, date moved: _____

Current Address: _____

Phone Number: _____ Cell Number: _____

E-Mail: _____

Did you renew your Driver's License in 2021? If so, please supply the following
(both spouses if applicable):

Issue date: _____ Expiration Date: _____ ID#: _____ State: _____

Marital Status: Single _____ Married _____ Divorced _____ Widow(er) _____ Separated _____

Has the number of dependents changed from last year? No _____ Yes _____

If Yes, explain change: _____

What amount did you receive for the Third Economic Impact Payment (issued beginning in March 2021): \$ _____

Did you receive any Advanced Child Tax Credit Payments? Yes _____ No _____

Amount: \$ _____

NOTE: IF YOU RECEIVED **ANY ADVANCED CHILD TAX CREDIT PAYMENTS** WE CANNOT FILE WITHOUT **IRS ISSUED LETTER 6419** OR A SUMMARY OF PAYMENTS FROM YOUR PERSONAL IRS ONLINE ACCOUNT (Currently both taxpayer AND spouse must create IRS accounts – go to <https://www.irs.gov/payments/your-online-account> CLICK **Sign in to Your Online Account** and you will be prompted to create an account if you do not already have one thru ID.me.)

Important Forms – Affordable Care Act Health Insurance (**Form 1095-A**), Unemployment information (**Form 1099G**), 2021 Stimulus/Third Economic Impact Payment (**IRS Letter 6475** - must have form or bank record to show amount received), 2021 Advanced Child Tax Credit (**IRS Letter 6419** - must have form or print out from IRS website showing any advanced payments).

Is your bank information the same last year? (for possible refund) Yes _____ No _____

If not, please provide your current bank name, routing number and account number
OR a cancelled check:

Bank Name:

Routing #

Account #