New Tax Client Detail Sheet

DROP OFF only______ OR Date of scheduled appointment: ______________, 2024

Taxpayer Name: ____

Social Security #: _________________________
Address: ____
Date of Birth: ______________________
Marital Status? Single_____Married___ Divorced ____ Widow(er)____ Separated ____
Home Phone #: ____________________ Work Phone #: ____________________
Cell Phone #: ______________________ Occupation: ______________________
E-Mail Address: ____
Driver's License information is required:

ID#:____________________ State: ______ Issue Date:______________ Expiration Date:______________

Bank Information (for direct deposit refund):

Bank Name ________________Routing #___________________ Account #_______________________

Account Type: Checking _____ Savings _____

Spouse Name: ____

Spouse Social Security #: _________________________
Spouse Date of Birth: _______________________
Spouse Phone #: _____________________ Spouse Occupation: ____________________
Spouse E-mail Address: ____
Driver's License information is required:

ID#:____________________ State: ______ Issue Date:______________ Expiration Date:______________

Dependent/Children Information (to be claimed on tax return):

Name: ___________________________ Social Sec. #___________________

Date of Birth: _____________________ Attend School or College? _________

Name: ___________________________ Social Sec. #___________________

Date of Birth: _____________________ Attend School or College? _________

Name: ___________________________ Social Sec. #___________________

Date of Birth: _____________________ Attend School or College? _________

New Tax Client Detail Sheet (cont)

Was your 2022 income tax return filed with the same filing status? Yes_____ No_____

Did you have the same dependents for 2023 as on your 2022 taxes? Yes_____ No_____

Are you a Homeowner or a Renter? ______________________________

Did you move in 2023? Yes_____ No_____ If Yes, date of the move? ___________

Did you purchase health insurance through Health Insurance Marketplace in 2023? Yes____ No____
If so, is your 1095-A form provided? Yes____ No____

If there were ANY MAJOR CHANGES during tax year 2023, please notate below and/or alert your tax preparer.

IMPORTANT FORMS TO INCLUDE (if applicable):
W2s
1099-Rs
1099-Div
1099-Int
1099 Composite (Investment Statement)
1098 Mortgage Interest
1099 Misc or 1099 NEC
1099-SSA Social Security Statement
1098 Tuition Statement
Student Loan Interest Statement
K1s
Income and Expense Totals (Self-Employed or Rentals)
Affordable care Act health insurance (Form 1095-A)
Unemployment information (Form 1099G)
Child Care Expenses
Charitable Contributions
Real Estate Taxes (if not on Mortgage Interest Statement)
Estimated Payments (amounts and dates paid)
Settlement Sheets (if moved)
PRIOR YEAR TAX RETURN