

Returning Client Update Information

PLEASE INCLUDE WITH TAX DOCUMENTS

DROP OFF only _____ **OR** **Date of scheduled appointment:** _____, 2024

Name: _____ **Date:** _____

Did you move in 2023? Yes _____ **No** _____ **If Yes, date moved:** _____

Current Address: _____

Phone Number: _____ **Cell Number:** _____

E-Mail: _____

Did you renew your Driver's License in 2023? If so, please supply the following (both spouses if applicable):

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

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

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

If Yes, explain change: _____

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 #

Account Type: Checking _____ **Savings** _____

IMPORTANT FORMS TO INCLUDE (if applicable):

W2s

1099-Rs

1099-Div

1099-Int

1099 Composite (Investment Statement)

Unemployment information (Form 1099G)

1098 Mortgage Interest

1099-SSA Social Security Statement

1099 Misc or 1099 NEC

1098 Tuition Statement

Student Loan Interest Statement

K1s

Income and Expense Totals (Self-Employed or Rentals)

Affordable care Act health insurance (Form 1095-A)

Child Care Expenses

Charitable Contributions

Real Estate Taxes (if not on Mortgage Interest Statement)

Estimated Payments (amounts and dates paid)

Settlement Sheets (if moved)