

# **New Tax Client Detail Sheet**

**DROP OFF only** \_\_\_\_\_ **OR** **Date of scheduled appointment:** \_\_\_\_\_, 2025

**Taxpayer Name:** \_\_\_\_\_

Social Security #: \_\_\_\_\_

Address: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Marital Status? Single \_\_\_\_\_ Married \_\_\_\_\_ Divorced \_\_\_\_\_ Widow(er) \_\_\_\_\_ Separated \_\_\_\_\_

Home Phone #: \_\_\_\_\_ Work Phone #: \_\_\_\_\_

Cell Phone #: \_\_\_\_\_ Occupation: \_\_\_\_\_

❖ **Please provide the email address you would like us to use for our secure portal. This is how you will receive a copy of your 2024 Tax Return.**

E-Mail Address for Secure Portal: \_\_\_\_\_

**Driver's License information is required:**

ID#: \_\_\_\_\_ State: \_\_\_\_\_ Issue Date: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

**Bank Information (for direct deposit/withdraw):**

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? \_\_\_\_\_

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Date of Birth: \_\_\_\_\_ Attend School or College? \_\_\_\_\_

**Name:** \_\_\_\_\_ **Social Sec. #** \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Attend School or College? \_\_\_\_\_

## Nex Tax Client Detail Sheet Continued

Was your 2023 income tax return filed with the same filing status? Yes\_\_\_\_\_ No\_\_\_\_\_

Did you have the same dependents for 2024 as on your 2023 taxes? Yes\_\_\_\_\_ No\_\_\_\_\_

Are you a Homeowner or a Renter? \_\_\_\_\_

Did you move in 2024? Yes\_\_\_\_\_ No\_\_\_\_\_ If Yes, date of the move? \_\_\_/\_\_\_/\_\_\_

Did you purchase health insurance through Health Insurance Marketplace in 2024? Yes\_\_\_\_\_ No\_\_\_\_\_

If so, is your 1095-A form provided? Yes\_\_\_\_\_ No\_\_\_\_\_

If there were ANY MAJOR CHANGES during tax year 2024, 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)

Paid Invoice for Energy Credit

Estimated Payments (amounts and dates paid)

Settlement Sheets (if moved)

PRIOR YEAR TAX RETURN