

Returning Client Update Information

Name: _____ Date: _____

Did you move in 2024? Yes _____ No _____ If Yes, date moved: ____ / ____ / ____

Current Address: _____

Phone Number: _____ Cell Number: _____

❖ 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: _____

Did you renew your Driver's License in 2024? 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: _____

For Direct Deposit/Withdraw Only: Is your bank information the same last year?
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)
Paid Invoice for Energy Credit
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)

Please OPEN all of your mail and REMOVE documents from envelopes before dropping off, thank you!