



## NEW CLIENT INFORMATION SHEET Tax Year 2023

### TAXPAYER INFORMATION

Full Name:		Social Security #:
Phone Number:	DOB:	Occupation in 2023:
Email Address:		

### SPOUSE'S INFORMATION

Full Name:		Social Security #:
Phone Number:	DOB:	Occupation in 2023:
Email Address:		

### ADDRESS & CONTACT INFORMATION

Address:		
City:	State:	ZIP Code:

### FILING STATUS

Marital Status as of 12/31/2023: <input type="checkbox"/> Single <input type="checkbox"/> Married	If married, did you live apart from your spouse for the last 6 months of 2023? <input type="checkbox"/> Yes <input type="checkbox"/> No
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### DEPENDENTS (Children under age 19 or under 24 if a full time student) Additional space on back.

First Name	Last Name	DOB	SS Number	Relationship to You	# of Months Lived with TP in 2023

We will need to make copies of Social Security Cards, please present them to us with this form.

### DURING 2023, DID YOU OR YOUR SPOUSE....

Own your own business? <input type="checkbox"/> Yes <input type="checkbox"/> No	Own rental property? <input type="checkbox"/> Yes <input type="checkbox"/> No
Start a "side gig" driving for Lyft, Uber, Instacart, Doordash, etc? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Receive alimony? <input type="checkbox"/> Yes <input type="checkbox"/> No	Pay alimony? <input type="checkbox"/> Yes <input type="checkbox"/> No Name and SS # of recipient of alimony:
Did you sell or trade bitcoin, dogecoin, or crypto-currency? <input type="checkbox"/> NO <input type="checkbox"/> YES - If yes, you must have a 1099-B from your broker. Please submit that to us.	
Receive unemployment benefits? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please provide the 1099-G form from your state.	
Are you a volunteer firefighter or ambulance worker? <input type="checkbox"/> Yes <input type="checkbox"/> No Name & Address of Company:	

### HOW DO YOU WANT TO FILE YOUR TAX RETURN?

<input type="checkbox"/> E-File	When your return is complete, you will pay our fee directly out of pocket. We will then electronically transmit your tax return. You may choose to have your refund direct deposited, or mailed to you in check form.
<input type="checkbox"/> Fee Collect	When your return is complete we will electronically transmit your tax return. Our fee for preparation is deducted from your refund amount. Additional fees will apply. You may choose to have your refund direct deposited, a check delivered to our office, or you can have it loaded onto a Green Dot Debit Card. <b>You must be receiving a refund to choose this option.</b>

**IF YOU ARE DUE A REFUND HOW WOULD YOU LIKE TO RECEIVE IT?**
 Check Mailed     
  Direct Deposit (see below)     
  Debit Card (Fee Collect only)

 Name of Bank:     
  Personal     Business     
  Checking     Savings

Routing #:      Account #:

**DUE DILIGENCE QUESTIONS**
 If requested by the IRS, can you provide documentation that shows evidence of the relationship between you and each of your dependents listed above (birth certificates, marriage certificates, court documents, etc.)?       Yes     No

 If requested by the IRS, can you provide documentation that shows evidence that each of your dependents lived with you for the number of months stated above during 2022 (school, medical, childcare records, etc.)?       Yes     No

 Can you, your spouse, or any of your dependents be claimed as a dependent on someone else's tax return?       Yes     No

 Are you claiming a child who is not your own son or daughter? If yes, please explain why the parents of the child are not claiming the child.       Yes     No

 Are you claiming a child who is permanently and totally disabled?       Yes     No

 Are you claiming a child between the ages of 19 and 23 who was a full-time student for any part of five calendar months during 2023?       Yes     No

 Were there any childcare expenses for children under the age of 13?       Yes     No
**TERMS OF ENGAGEMENT**

We will prepare your Federal and State income tax returns as requested using information you provide. We may ask for clarification of some items, but we will not audit or otherwise verify the information you provide us. It is your responsibility to provide all the information required for preparation of complete & accurate tax returns. You should retain all documents, cancelled checks, and other data that support your reported income and deductions. These may be necessary to prove the accuracy to a taxing authority. You have the final responsibility for your income tax returns, and therefore, you should review them carefully before you sign them.

All of the information I have given is true and correct to the best of my knowledge. I also agree to and accept the Terms of Engagement.

Taxpayer Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**NOTES:** (Please provide any additional information you would like us to know in the space below.)