

NAME(S): \_\_\_\_\_ DATE: \_\_\_\_\_

TP PH #: \_\_\_\_\_ TP EMAIL: \_\_\_\_\_

SP PH #: \_\_\_\_\_ SP EMAIL: \_\_\_\_\_

## \*COPY\*

Tax return copy preference: PAPER ELECTRONIC BOTH

## \*ADDRESS\*

• Has your address changed from last year's return? YES NO

If "YES," please update: \_\_\_\_\_

## \*CRYPTO\*

• Did you receive crypto currency as payment in 2023 (e.g. reward; award; etc)? YES NO

• Did you sell/exchange/dispose of crypto currency in 2023? YES NO

## \*BANKING\*

• Direct Deposit any refund(s)? YES NO • ACH any tax(es) owed? YES NO

• Has your banking information changed from last year? (if 'YES' update info below) YES NO

Name of Financial Institution: \_\_\_\_\_

Routing #: \_\_\_\_\_ Acct #: \_\_\_\_\_ CHK SAV

If filing a joint tax return, are both you & your spouse named on the account? YES NO

## \*HEALTH INSURANCE\*

• Did you obtain insurance through the Marketplace (if 'YES' provide Form 1095-A) YES NO

## \*FILING STATUS\*

• Is there a change to your filing status for 2023? YES NO

If "YES," please select the applicable change: Marriage Divorce Surviving Spouse

## \*DEPENDENTS\*

• Is there a change to the dependent(s) you are claiming on your tax return for 2023? YES NO

If "YES," please complete the following:

First & Last Name	Birthdate	SSN	Relationship	Status
				ADD REMOVE
				ADD REMOVE
				ADD REMOVE
				ADD REMOVE
				ADD REMOVE