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Certified Public Accountants

## 2023 Tax Information Sheet

Taxpayer Name: \_\_\_\_\_ Occupation: \_\_\_\_\_

Phone #: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Email: \_\_\_\_\_

Spouse Name: \_\_\_\_\_ Occupation: \_\_\_\_\_

Phone #: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Email: \_\_\_\_\_

How would you like to receive your client copy of the tax return? (Check only one)

\_\_\_\_\_ Email copy \_\_\_\_\_ Printed copy

If you are receiving a refund, tell us how you would like to receive the refund. (Check only one)

☐ Apply the overpayment as a credit to 2024 tax liability

☐ Check in the Mail

☐ Direct Deposit to your account we have on file (if account changed, fill out information below)

Financial Institution: \_\_\_\_\_ Checking or Savings \_\_\_\_\_

Routing Number: \_\_\_\_\_ Account Number: \_\_\_\_\_

### Please fill in below for information during the year of 2023:

Did you have a change in marital status? \_\_\_\_\_ ☐ NO ☐ YES

Did you have a change in dependents? \_\_\_\_\_ ☐ NO ☐ YES

Did you have a change in address? **If so, please provide move date and new address below** ☐ NO ☐ YES

If your dependent children have income, would you like us to prepare their tax returns? ☐ NO ☐ YES

Did you make estimated tax payments? **If so, please provide amounts & dates paid below** ☐ NO ☐ YES

Did you receive (as a reward, awards, or payment for services or property), sell, exchange, gift,  
or dispose of a digital asset (or a financial interest in a digital asset)? ☐ NO ☐ YES

Do you own a direct financial interest in any foreign accounts or have signature authority? ☐ NO ☐ YES

Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? ☐ NO ☐ YES

Did you purchase anything energy efficient for your primary residence? **If so, please provide details** ☐ NO ☐ YES

Did you purchase health insurance through the Health Insurance Marketplace? ☐ NO ☐ YES

**\*If you answered yes to above, you will need to provide us form 1095A**

Do you have Venmo, Paypal, eBay, or any other electronic payment account & received Form 1099-K? ☐ NO ☐ YES

**If you are claiming dependents on your tax return or college tax credits, please ask for our Questionnaire to fill out**

Additional Information, Comments, Questions: \_\_\_\_\_

ALL INFORMATION I HAVE GIVEN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE

Signature: \_\_\_\_\_

Date: \_\_\_\_\_