

Individual Tax Worksheet – Returning Client



Client Information

Taxpayer Name: _____ Spouse Name: _____

Phone Number: _____ Did you move this year? Y N Date moved: _____

Current Address: _____ City & State: _____

Taxpayer Email: _____ Spouse Email: _____

Other Required Information

Did you exchange digital assets (i.e. Bitcoin) Y N Do you have funds in a foreign bank account? Y N

Is your bank account the same as last year? Y N (if your bank acct has changed complete below)

Bank: _____ Routing #: _____ Account #: _____ Checking Savings

Did you pay all FEDERAL estimates? Y N Did you pay all STATE estimates? Y N

Dependent Information Changes: (MUST include copy of social security card for new dependents.)

NEW Dependent - Name: _____ Rel: _____ DOB: _____ SSN: _____

Not claiming as dependent this year - Name: _____ Who is claiming them? Self Other parent

Do you have custody of the dependents you are claiming? Y N (explain below if necessary)

Children in school Expenditures: K-12 Tuition, Books, Extracurriculars: \$ _____

College Education Expenses: Y N

Educator expense: \$ _____ (up to \$500 for K-12 public school teachers only)

Preferences

Pick up location: _____

Tax Return Copy: Paper Electronic Signature: In Person Electronic