

# Individual Tax Worksheet – Returning Client

## Client Information

Taxpayer Name: \_\_\_\_\_ Spouse Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Did you move this year? Y N Dates moved: \_\_\_\_\_

Current Address: \_\_\_\_\_ City & State: \_\_\_\_\_

Taxpayer Email: \_\_\_\_\_ Spouse Email: \_\_\_\_\_

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

## 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)

**Dependents you are claiming this year:** \_\_\_\_\_

NEW Dependent - Name: \_\_\_\_\_ Rel: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_

**(MUST include a copy of social security card for new dependents.)**

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

**Preferences:** Pick up location: Osage \_\_\_ Riceville \_\_\_ Cresco \_\_\_ Nashua \_\_\_

Tax Return Copy: Paper \_\_\_ Electronic \_\_\_ Signature: In-Person \_\_\_ Electronic \_\_\_