

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 ___