



Tax Year 2020

Client Information Sheet

Name(s): _____
 Dependent Changes: _____

Address: Same as last year? Yes No
 If no, new Address: _____

Phone Numbers: _____
 Email Address: _____

What is your preferred method of contact? Phone Email
 Are you a new client? Yes No
 If yes, how did you hear about us? _____

If you receive a refund, would you like it direct deposited? Yes No

If yes, same financial institution as last year? Yes No

Amounts received for 2020 stimulus payments. Amount\$ _____ Amount\$ _____

Did you buy or sell any virtual currency in 2020? Yes No

Client Copy: Hard Copy Email PDF Both

Pickup: In Person Mail (fee applies)

For Office Use Only:

Engagement Letter: _____ PC/QB: _____ Circle If Applicable: Katrina/Steve/Kim

	Date	Initials
Date In:		
Date out:		

	Date	Initials
DL:		
DL (spouse):		

Prepare:		
Review:		

Payment:		
Rec'd 8879:		

E-file sent:		
E-file accepted:		

Notes: _____

