



Tax Year 2021

**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

Amount received for stimulus payment \$ \_\_\_\_\_, Advance Child Tax Credit \$ \_\_\_\_\_

Did you make a cash donation to a non-profit of at least \$300/\$600? Amount \$ \_\_\_\_\_

Did you buy or sell any virtual currency in 2021? 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/**Muskegon**

	Date	Initials
Date In:		
Date out:		

	Date	Initials
DL:		
DL (spouse):		

Prepare:		
Review:		

Payment:		
8879/8453:		

E-file sent:		
E-file accepted:		

Notes: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_