



Name(s): Dependent Changes: Address: Same as last year? If no, new Address: Phone Numbers: Email Address: What is your preferred method of contact? 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: Date Initials Prepare: Review:	Tax Year 2021 Client Information Sheet					
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