



TAX YEAR IF NOT 2022 _____ TAX RETURN TYPE IF NOT 1040 _____

Client Information Sheet

Name: _____
 Phone: _____ (home/cell/work)
 Email: _____
 Joint Name: _____
 Phone: _____ (home/cell/work)
 Email: _____

What is your preferred method of contact? Phone Email

Are you a new client? Yes or No If yes, how did you hear about us? _____

Address: Same as last year? Yes No

If no, new Address: _____

Client Copy (fee for copy requests later): Hard Copy Email PDF Both

Sign Electronically Via DocuSign? (email required) Yes No

Pickup: In Person Mail (fee applies)

Dependent Changes: Yes No If Yes, Explain: _____

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

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

Did you buy or sell any virtual currency in 2022? Yes No

For Office Use Only:

Engagement Letter: _____ PC/QB: _____ Circle: GH or Muskegon

	Date	Initials		Date	Initials
Date In:			DL:		
Date out:			DL (spouse):		
Prepare:			PD: \$/ck/cc		
Review:			8879 Rec'd:		
E-file sent:					
E-file accepted:					

Notes: _____

