

CLIENT INFORMATION SHEET



TAX YEAR IF NOT 2023 \_\_\_\_\_

TAX RETURN TYPE IF NOT 1040 \_\_\_\_\_

NAME: \_\_\_\_\_
Phone: \_\_\_\_\_ (home/cell/work)
Email: \_\_\_\_\_
Joint Name: \_\_\_\_\_
Phone: \_\_\_\_\_ (home/cell/work)
Email: \_\_\_\_\_

Address: Same as last year? Yes If No, New Address: \_\_\_\_\_

What is your preferred method of contact? Phone Email

Are you a new client? No If Yes, How did you hear about us? \_\_\_\_\_

Client Copy: Paper Copy (sign paper form and pickup in person)
(Fee for copy requests later.) Digital PDF (DocuSign – separate email required for each signer)
Paper & Digital PDF \$5.00 fee (DocuSign & pickup in person or mail)

Pickup Documents: In Person OR Mail (fee applies) OR N/A

Dependent Changes: 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 2023? Yes No

For Office Use Only:

Engagement Letter: \_\_\_\_\_ PC/QB: \_\_\_\_\_ Circle: GH or Muskegon

Date In: [table with Date and Initials columns]
Date out: [table with Date and Initials columns]

DL: [table with Date and Initials columns]
DL (spouse): [table with Date and Initials columns]

Prepare: [table with Date and Initials columns]
Review: [table with Date and Initials columns]

PD: \$/ck/cc [table with Date and Initials columns]
8879 Rec'd: [table with Date and Initials columns]

DocuSign sent: [table with Date and Initials columns]
DS accepted: [table with Date and Initials columns]

E-file Sent: [table with Date and Initials columns]
E-file Accept: [table with Date and Initials columns]

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