

CLIENT INFORMATION SHEET



TAX YEAR IF NOT 2024 \_\_\_\_\_

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

Institution: \_\_\_\_\_ Routing: \_\_\_\_\_ Account: \_\_\_\_\_

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

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