

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:	<input type="text"/>	<input type="text"/>	DL:	<input type="text"/>	<input type="text"/>
Date out:	<input type="text"/>	<input type="text"/>	DL (spouse):	<input type="text"/>	<input type="text"/>
Prepare:	<input type="text"/>	<input type="text"/>	PD: \$/ck/cc	<input type="text"/>	<input type="text"/>
Review:	<input type="text"/>	<input type="text"/>	8879 Rec'd:	<input type="text"/>	<input type="text"/>
DocuSign sent:	<input type="text"/>	<input type="text"/>	E-file Sent:	<input type="text"/>	<input type="text"/>
DS accepted:	<input type="text"/>	<input type="text"/>	E-file Accept:	<input type="text"/>	<input type="text"/>

Notes: _____

