

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 2024? Yes No

Did you pay your estimates? Federal - Amount: _____ State - Amount: _____ No
(Please provide proof when submitting tax documents)

For Office Use Only: Engagement Letter: _____ PC/QB: _____ Circle: GH or Muskegon

Table with columns for Date and Initials for various actions: Date In, Date out, Prepare, Review, DocuSign sent, DS accepted, DL, DL (spouse), PD: \$/ck/cc 8879 Rec'd, E-file Sent, E-file Accept.

Notes: _____