



Client Information Worksheet

I am a: Returning client (check here and complete changes only) New client (check here and complete all lines completely).

Taxpayer / Spouse Information

Taxpayer name: _____ Spouse name: _____
 Street address: _____ Apartment number: _____
 City: _____ State: _____ Zip code: _____ Twp. or Boro: _____

Taxpayer

Spouse

Occupation:	_____	_____
Date of birth:	_____	_____
Social Security #:	_____	_____
DL #/Passport	_____ Issued:_____ Expiration:_____	_____ Issued:_____ Expiration:_____
Home Phone #:	_____ Preferred? Yes / No	_____ Preferred? Yes / No
Work Phone #:	_____ Preferred? Yes / No	_____ Preferred? Yes / No
Cell Phone #:	_____ Preferred? Yes / No	_____ Preferred? Yes / No
Email:	_____ Preferred? Yes / No	_____ Preferred? Yes / No

Has there been a change in your marital Status? Yes / No

If yes, explain: _____

Are you (or your spouse) nearing age 70 1/2? Yes / No

If yes, how many IRA's do you have? _____

Please indicate the number of members of your household including older parents, adults, children, etc.: _____

Did you move in the previous year? Yes / No

Dependents

	<u>First</u>	<u>Second</u>	<u>Third</u>
Name	_____	_____	_____
Date of birth	_____	_____	_____
Social security #	_____	_____	_____
In household more than 6 months?	Yes / No	Yes / No	Yes / No
	<u>Fourth</u>	<u>Fifth</u>	<u>Sixth</u>
Name	_____	_____	_____
Date of birth	_____	_____	_____
Social security #	_____	_____	_____
In household more than 6 months?	Yes / No	Yes / No	Yes / No

Were there any change in dependents this year? Yes / No

Income and Losses

Did you have the same employer as last year?	Yes / No
Do you own any Series E Treasury Bonds?	Yes / No
Did you have any life insurance proceeds?	Yes / No
Did you have any tax carryovers (capital loss, etc)?	Yes / No

If yes, list:	
Did you buy or sell any investments?	Yes / No
Did you file for or receive a property tax / rent rebate last year?	Yes / No
Has any property you own (e.g., stock or other equities) become worthless?	Yes / No
Did you receive any social security benefits	Yes / No

Expenses

Did you contribute to an IRA or Retirement account last year?	Yes / No
Did you contribute to a 529 college savings plan?	Yes / No
If so, for who?	
Did you have work-related expenses (union dues, classroom supplies, etc.)?	Yes / No
If yes, describe:	
Did you buy or sell a home last year?	Yes / No
Did you make any large purchases during the year (car, boat, etc.)?	Yes / No
If yes, describe:	
Did you have any dependent care expenses (daycare, summer camps, etc.)?	Yes / No
Did you, your spouse, or any dependents take any university or technical college classes?	Yes / No
Did you pay any student loan interest?	Yes / No
Did you refinance your mortgage?	Yes / No
Amount of charitable contributions (must have supporting documentation for all items):	Yes / No
Cash \$:	Non-cash \$:
Did you have any internet purchases where Sales Tax or Use Tax was not remitted to the state in which you reside?	Yes / No

Other Items

Do you have any foreign bank accounts or assets?	Yes / No
Did you hold any cryptocurrencies during the year?	Yes / No
Did you give or transfer title on any property?	Yes / No
Are you receiving health insurance through an ACA exchange?	Yes / No
Were you and your family covered under a healthcare provider for all of the year?	Yes / No

Tax Compliance Matters

Did you make ESTIMATED TAX PAYMENTS?	Yes / No
Have you received any tax notices in the previous year?	Yes / No
Did you work in more than one state or city with income tax filing requirements?	Yes / No

Filing / Funding Options

FILING/FUNDING OPTIONS

Do you want to directly deposit your refund into a bank account? Yes / No

Bank name: _____ Account number: _____ Routing number: _____

Opportunities

We offer a complimentary 1/4 hour of tax planning to all clients. Date and time you can come in: _____

Are you interested in having Taxoom represent you in any audit matters related to this filing year? Yes / No

Survey

All clients:

Please rank, in order from 1-6, what is most important to you regarding our service (rank from 1 to 6: 1 = lowest, 6 = highest):

_____ Technical accuracy _____ Price of return _____ Tax results

_____ Friendly and competent preparer _____ Convenience _____ Other(_____)

Please tell us today what you are hoping to gain from our service: _____

New clients only:

Why did you decide to change firms? _____

How did you hear about us? _____