1. Would you like a complete organizer? Not necessary for all returns, but a helpful framework for compiling your 2023 documents. Email\_\_\_\_\_\_ Printed\_\_\_\_\_\_ Mailed\_\_\_\_\_\_
2. Did you buy, sell, or refinance any real estate in 2023? If so, please provide the **Settlement Disclosure** from the closing.
3. Did your mortgage servicer change? Provide all **Form 1098** mortgage interest statements for 2023.
4. Which dependents will you be claiming for 2023? Same as 2022\_\_\_\_\_\_

NEW or NOT CLAIMING (circle one) Dependents for 2023:

a. Name & Relationship: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

b. Social Security number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

c. Birthday: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Add additional dependents on back page*

1. Dependent Care: *Please include documentation*

Care Provider: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Amount Paid: \_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Tax ID: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Were you or your dependent in college, continuing education, or paying tuition for classes? Please include any tuition paid for another year paid in 2023. **Need Form 1098-T**
2. Same employer as 2022 - New employer in 2023 - Both (circle one) Please provide all **W2**s and **1099-NEC**
3. Same bank account as 2023? YES\_\_\_\_\_\_ NO\_\_\_\_\_\_

If No, Bank Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Routing #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Account #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Updates to address or phone number? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Driver’s license number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Issue Date: \_\_\_\_\_\_\_\_ Expiration Date: \_\_\_\_\_\_\_\_
3. Do you have an outstanding balance with the IRS? YES\_\_\_\_\_\_ NO \_\_\_\_\_\_

If Yes, would you like us include a payment plan request with your return filing?

Please use the above bank account and have the amount withdrawn on (1st -28th of the month) \_\_\_\_\_\_

1. Any other changes or issues we need to know about? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Finished returns: **PICKUP - EMAIL - MAIL** (*circle one)*

**\*\*\*\*NEW CLIENTS ONLY\*\*\*\*** **Please include a copy of the last returns filed.**