

Client name:

Client Email:

Date:

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*
5. Dependent Care: *Please include documentation*

Care Provider: _____ Amount Paid: _____

Address: _____ Tax ID: _____
6. 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**
7. Same employer as 2022 - New employer in 2023 - Both (circle one) Please provide all **W2s** and **1099-NEC**
8. Same bank account as 2023? YES _____ NO _____

If No, Bank Name: _____

Routing #: _____ Account #: _____
9. Updates to address or phone number? _____
10. Driver's license number: _____ Issue Date: _____ Expiration Date: _____
11. 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Please use the above bank account and have the amount withdrawn on (1st -28th of the month) _____
12. Any other changes or issues we need to know about? _____

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

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

Mail - Email - Pickup

Paid: Y / N

Documents complete date:

Client name:

Client Email:

Date:

Mail - Email - Pickup

Paid: Y/N

Documents complete date: