



Personal Information				Received by:				
First Name		M.I.	Last Name		Are you a U.S. Citizen?			
					<input type="radio"/> Yes <input type="radio"/> No			
Date of Birth	SSN#		Are you legally Blind		<input type="radio"/> Yes <input type="radio"/> No			
			Totally & Permanently Disabled		<input type="radio"/> Yes <input type="radio"/> No			
Spouse's First Name		M.I.	Last Name		Are you a U.S. Citizen?			
					<input type="radio"/> Yes <input type="radio"/> No			
Spouse's Date of Birth	SSN#		Are you legally Blind		<input type="radio"/> Yes <input type="radio"/> No			
			Totally & Permanently Disabled		<input type="radio"/> Yes <input type="radio"/> No			
Mailing Address			City	State	Zip Code			
Primary Phone		<input type="radio"/> Cell <input type="radio"/> Home <input type="radio"/> Work	Spouse's Primary Phone		<input type="radio"/> Cell <input type="radio"/> Home <input type="radio"/> Work			
E-mail		Spouse's E-Mail						
Your Occupation		Spouse's Occupation						
Can your parents or someone else claim you or your spouse on their tax return?					<input type="radio"/> Yes <input type="radio"/> No			
Family and Dependent Information								
As of December 31st, 2021, your marital status was:								
<input type="radio"/> Single								
<input type="radio"/> Married		Did you live with your spouse during any part of the last 6 mos. of 2021? <input type="radio"/> Yes <input type="radio"/> No						
<input type="radio"/> Divorced or Legally Separated		Date of final decree or separate maintenance agreement: / /						
<input type="radio"/> Widowed		Year of spouse's death:						
List the name of everyone below who lived in your home and outside your home that you supported during 2022								
Name (First, Last)	Date of Birth	SSN#	Relationship	Mos. Lived in your home	US Citizen	Single as of 12/31/19	Full-Time Student	Rec'd more than \$4200 in income
Do Not enter your name or Spouse's Name Below	(mm/dd/yyyy)	#	(Son, Daughter, Mother, Sister, Etc.)	#		<u>Yes or No</u>		
1								
2								
3								
4								
5								
6								
7								
IRS Financial Due Diligence								
In 2021 did you receive, sell, send, exchange or otherwise acquire any financial interest in virtual currency?					<input type="radio"/> Yes <input type="radio"/> No			
In 2021 did you have any interest in or signature or authority over a foreign account in a foreign country?					<input type="radio"/> Yes <input type="radio"/> No			
In 2021 did you receive a distribution from or were you a grantor/transferor to a foreign trust?					<input type="radio"/> Yes <input type="radio"/> No			
Tax Return Options								
Would you prefer a SIT DOWN APPOINTMENT or to DROP OFF info. to prepare your return?					<input type="radio"/> Sit Down Appt <input type="radio"/> Drop Off			
Would you prefer to receive a PAPER COPY or an ELECTRONIC COPY of your Tax Return?					<input type="radio"/> Paper <input type="radio"/> Electronic			
Would you like your previous years tax returns 2013-2018 to be added to the New Client Portal? (\$25 Fee)					<input type="radio"/> Yes <input type="radio"/> No			

Completed By: _____

Date: _____