

Drop off date: _____

Pick Up date: _____

Federal _____

State _____

Local _____

Returning Client Questionnaire

Taxpayer _____ Contact Phone _____

Email **Updated** _____

Driver's License if needs **Updated** _____

Bank Account if **Updated** _____

DID YOU:

Move: New Address _____ Date of Move _____

Change in Occupation _____ If yes _____

Change in Health Insurance _____ if Yes _____

Dependent Form for each a dependent form must be on file.

Add new dependents _____ Relationship: _____

Did dependent live with you? _____ Explain: _____

Remove current dependent _____ Who/reason? _____

Did you marry or divorce? _____ Date _____

Was new social security card required? _____

Were Children involved _____ if yes are you the custodial parent

Include the following:

- All W-2's, 1099's (R, SSA, UC, C), 1098's (E, T, INT, DIV, Mort) _____
- PA UE (Union Dues Uniforms) Rentals, Self-employed, LLC, partnership or corporation include breakdown, business books/registers (additional information required)

Would you like to:

Direct Deposit if refund _____

Auto-Debit if Balance due _____

Designate \$3 to Presidential election campaign fund
(does not affect your refund or balance due)

Auto debit

date will be last date of tax season

I would like to receive:

- a printed copy of my tax return and supporting documents.
- a digital copy of my tax return and supporting documents via encrypted email.
- a digital copy of my tax return and supporting documents on a thumb drive provided by me.
- a printed copy of my tax return and supporting documents by snail-mail for \$10 extra.
- I do not want a copy of my tax return in any format above.

I am solely responsible for the accuracy of the data that I provide. I understand that my return will be prepared based on the information I provide; and I will be charged an additional fee if changes have to be made to my return.

I understand all forms must be signed before my tax returns are efiled.

I will keep my copy of my tax return in a safe place and understand a fee of \$10 will be charged for a duplicate copy. NO PIN #'s or AGI's will be given out without the paid fee.

Signature: _____ (REQUIRED)

IF ADDITIONAL INFORMATION IS NEEDED USE SPACE ON THE BACK

Any questions, comments or changes we should know about?

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