

# UPDATE/QUESTIONNAIRE

# 2024

**PLEASE PRINT LEGIBLY**

\_\_\_ PREVIOUS CLIENT  
\_\_\_ NEW Client  
\_\_\_ Prior yr tax copy attached

TAX YEAR \_\_\_\_\_ Today's Date \_\_\_ / \_\_\_ / \_\_\_ Referred By \_\_\_\_\_

**Did You Have**  
Health Insurance? Yes / No  
Provide Form 1095 A/ B/ C \_\_\_  
**Do You Have**  
Long Term Care: Yes / No  
Dental Plan? Yes / No

**Do you have an IRS -IP Pin**  
letter? Yes \_\_\_ No \_\_\_  
**Were you Self-Employed**  
during this tax year? Y or N  
You may need to pay Est Tax  
*If yes. Please discuss*

**Virtual Currency:**  
Did/Do you have Foreign Acct  
or Trust ? Y or N  
Receive, Sell or Exchange  
digital/virtual financial asset?  
Yes or No

**E-MAIL** (PRINT CLEARLY): \_\_\_\_\_

YOUR NAME \_\_\_\_\_ SS# - - - DOB \_\_\_ / \_\_\_ / \_\_\_ Over Age 65 ---

SPOUSE \_\_\_\_\_ SS# - - - DOB \_\_\_ / \_\_\_ / \_\_\_

HOME ADDRESS \_\_\_\_\_ CELL# \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_ DAY /WORK \_\_\_\_\_

MAIDEN NAME (if any) \_\_\_\_\_ EVE/HOME \_\_\_\_\_

**FILING STATUS:** \_\_\_ Single \_\_\_ Head/House \_\_\_ Married-J \_\_\_ MARRIED SEP \_\_\_ Active Military \_\_\_  
**IF HOH checked, is Lease/Mtg Stmt. same name? Yes / No** For EIC Complete Add'l forms

JOB TITLE \_\_\_\_\_ SPOUSE JOB TITLE \_\_\_\_\_ UNEMPLOYED \_\_\_\_\_ RETIRED \_\_\_\_\_

LIST ALL DEPENDENTS FULL NAME: (\*\*1<sup>st</sup> Time Clients Must Show SS card for all)

PRINT DEPENDENT FULL NAME	SS#	RELATION TO YOU	D.O.B
_____	_____	_____	___ / ___ / ___
_____	_____	_____	___ / ___ / ___
_____	_____	_____	___ / ___ / ___
_____	_____	_____	___ / ___ / ___

**NO LONGER CLAIMING DEPENDENT --- WRITE/PRINT NAMES TO DELETE**

Child Care Provider \_\_\_\_\_  
NAME EIN/SSN #

Address/City/State/Zip Amt Paid Weekly or Bi-Weekly

**YOU ARE RESPONSIBLE TO SUBMIT ALL YOUR INCOME DOCUMENTS TO FILE A ACCURATE RETURN, W2, 1099's, UNEMP, GAMBLING, INT, DIV, SSA, TUITION, 1095HC, and list of Expenses. IF YOU FORGET OR RECEIVE A LETTER, THERE IS FEE TO AMEND TAXES, & AMENDMENTS ARE DONE AFTER APRIL DEADLINE... AVOID REJECTS, PENALTIES & DELAYS PROVIDE ACCURATE INFO.**

SEE OVER

