

CLIENT INFORMATION

Drop Off Date: _____

Do We Have Your Last Tax Return? ☐ Yes ☐ No

Client(s): _____

Did You Have Any Investments? Confirmed Information?

☐ Bitcoin ☐ Acorns ☐ Robinhood ☐ Phone ☐ New: _____

Preferred Contact Method? ☐ Email ☐ New: _____

☐ Phone ☐ Email ☐ Address ☐ New: _____

If You Are Receiving a Refund, Would You Prefer: ☐ Check ☐ Direct Deposit ☐ Unsure

If You Owe Money, Would You Prefer: ☐ Check ☐ Auto Withdrawal ☐ Unsure

Do We Have Your Bank Information? ☐ Yes ☐ No ☐ Unsure

Are You Using the Same Bank as Last Year? ☐ Yes ☐ No ☐ Unsure

Bank: _____

Routing: _____

Account: _____

☐ Checking ☐ Savings

How Would You Like To Sign? ☐ E-Sign ☐ In Person

How Would You Like a Copy of Your Tax Return? ☐ Portal ☐ Email ☐ Paper ☐ Mail

Do You Have An Appointment? ☐ Yes ☐ No Do You Want An Appointment? ☐ Yes ☐ No

Appointment Type? ☐ In Person ☐ Phone ☐ Zoom Appointment Date: _____

Any Additional Information: