

NEW CLIENT

RETURNING CLIENT

PREVIOUS CLIENT

FILING STATUS: SINGLE  MFJ  MFS  H of H

FAMILY NAME \_\_\_\_\_ SPOUSE LAST NAME: \_\_\_\_\_

TAXPAYER: \_\_\_\_\_ BIRTHDATE \_\_\_\_\_ SSN \_\_\_\_\_

OCCUPATION \_\_\_\_\_

SPOUSE: \_\_\_\_\_ BIRTHDAY \_\_\_\_\_ SSN \_\_\_\_\_

OCCUPATION \_\_\_\_\_

ADDRESS: \_\_\_\_\_

TP-CELL NUMBER \_\_\_\_\_ SP-CELL NUMBER \_\_\_\_\_

EMAIL: \_\_\_\_\_

DEPENDENTS LIVING WITH YOU (D) OR QUALIFYING CHILD BUT NOT A DEPENDENT. (Q) INDICT BY USING Q OR D

1. \_\_\_\_\_ BIRTHDATE \_\_\_\_\_ SSN \_\_\_\_\_
2. \_\_\_\_\_ BIRTHDATE \_\_\_\_\_ SSN \_\_\_\_\_
3. \_\_\_\_\_ BIRTHDATE \_\_\_\_\_ SSN \_\_\_\_\_
4. \_\_\_\_\_ BIRTHDATE \_\_\_\_\_ SSN \_\_\_\_\_
5. \_\_\_\_\_ BIRTHDATE \_\_\_\_\_ SSN \_\_\_\_\_

### WHAT CHANGES HAPPENED IN 2023

1. Marital status change in 2023? YES- \_\_\_\_\_
2. Birth/Adoption of a child in 2023? YES (indicate which dependent above) \_\_\_\_\_
3. Remove a 2023 dependent from the 2022 tax return. YES \_\_\_\_\_
4. Attended college in 2022/2023 YES- (indicate who attended college above) \_\_\_\_\_
5. Deceased in 2023 that was on your 2022 tax return. YES OR NO