

**FOR OFFICE USE ONLY**  
Date:

Preparer:

Taken by:

## **2023 TAX YEAR RETURNING CLIENT**

**PLEASE PRINT**

<b>Taxpayer:</b>	<b>Spouse:</b>
<b>Phone:</b>	<b>Phone:</b>
<b>Email:</b>	<b>Email:</b>
<b>Address:</b>	

Has your address changed? \_\_\_\_\_

Has your marital status changed? \_\_\_\_\_

Did you or your spouse become disabled or blind? \_\_\_\_\_

Did your occupation change? \_\_\_\_\_

Do you have any new dependents? \_\_\_\_\_

<b>NEW Childs Name</b>	<b>Birthdate</b>	<b>SS#</b>

Do you have any children who ***Graduated high school/college, moved out, got married, worked full time, etc.,*** that no longer qualify to be your dependent for 2023?

<b>NAME OF FINANCIAL INSTITUTION</b>	<b>ROUTING NUMBER</b>	<b>ACCOUNT NUMBER</b>	<b>Checking or Savings?</b>

***Did your Direct Deposit banking information change?*** \_\_\_\_\_

<b>TAXPAYER ID STATE:</b>	<b>SPOUSE ID STATE:</b>
<b>ID #:</b>	<b>ID#:</b>
<b>ISSUE DATE:</b>	<b>ISSUE DATE:</b>
<b>EXPIRATION DATE:</b>	<b>EXPIRATION DATE:</b>
<b>DRIVERS LICENSE OR STATE ID? (Circle one)</b>	<b>DRIVERS LICENSE OR STATE ID? (Circle one)</b>

**Any additional information or questions for your preparer? (Use back if needed)**

