



Client Information Sheet

Taxpayer				Spouse				
Last Name:				Last Name:				
First Name				First Name				
Middle Name				Middle Name				
Preferred Name				Preferred Name				
Soc. Sec. Number:				Soc. Sec. Number:				
Occupation:				Occupation:				
Date of Birth:				Date of Birth:				
E-mail Address:				E-mail Address:				
Mobile Phone:				Mobile Phone:				
Home Phone:				Home Phone:				
Address:								
City		State		Zip				
Were you a full year resident of Tennessee in 2023							Yes	NO
If you answered no, please list below which other state(s) that you lived in and when your residency changed:								

Dependent Information

Dependent Name (First, Middle, Last)	Date of Birth	Dependent's Soc. Sec. Number	Relationship	Child Care		College Tuition	
				Yes	No	Yes	No

Bank Account Information

Returning clients only: Same bank account as last year?			Yes	No
Would you like for your tax preparation fee to be drafted from the same account when the return is e-filed?				
If you have an overpayment of 2023 taxes, do you want the excess applied to your 2024 estimated tax (instead of being refunded)?				
Bank	Routing Number	Account Number		



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Please check how you would like to receive your completed return.	<input type="checkbox"/>	Electronic
	<input type="checkbox"/>	Pick up at Office
	<input type="checkbox"/>	Mailed

If you sent original tax documents, would you prefer to pick them up at our office or have them mailed back to you after your tax return has been e-filed?	<input type="checkbox"/>	Pick Up at Office
	<input type="checkbox"/>	Mailed

Who may we thank for referring you?	
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Additional Information/Questions:

- Please Return this form with the following documents:**
- Copy of Driver’s License(s)
 - 2023 Tax Questionnaire
 - Copy of 2022 Tax Return (new clients only)
 - 2023 Tax Documents



2023 Tax Questionnaire

Personal Information		
	Yes	No
1. Did your marital status change?		
2. Can you be claimed as a dependent by another taxpayer?		
3. Did you pay or receive alimony or spousal maintenance?		
4. Did you have income or investment interest in a state other than your resident state?		
5. Are there any life events such as separation, divorce, marriage, new children, adoptions and/or disability?		
6. Did you make any major purchases during the year (cars, boats, etc.)?		
7. Do you have signature authority of a foreign bank account?		
8. Did you or any dependents receive an Identity Protection PIN (IP PIN) from the IRS, or have you or any dependents been a victim of identity theft? If yes, please include the 2023 IRS letter for filing returns with your tax documents.		

If you answered Yes to any of these questions, please list the question number and explain:

Estimated Tax Payments			
Did you make any 2023 estimated tax payments? If yes, please list dates and amounts below			
Date	Amount	Date	Amount

Dependent Information		
	Yes	No
1. Were there any changes in dependents from the prior year?		
2. Do you alternate dependents with an ex-spouse for tax purposes?		
3. Did any of your children have investment income?		
4. Do you have dependents who have or will file a tax return?		
5. Did you provide support for any dependents besides your children?		
6. Did you pay for childcare while you worked or looked for work, or as a full-time student?		

If you answered Yes to any of these questions, please list the question number and explain:



2023 Tax Questionnaire

Retirement		
	Yes	No
1. Did you make or intend to make by April 15 any IRA or Roth IRA contributions*?		
2. Did you convert any IRAs into Roth IRAs (backdoor conversion)?		
3. Did you make any Keogh, SIMPLE, SEP or 401k contributions thru your business?		
4. Did you make any withdrawals from a 401k, 403b or IRA under the favorable treatment of the CARES Act?		
5. Did you make or intend to make by April 15 any IRA or Roth IRA contributions*?		

If you answered Yes to any of these questions, please list the question number and explain:

Education		
	Yes	No
1. Did you pay any student loan interest?		
2. Did you or a dependent have any tuition or school-related expenses?		
3. Did you make any contributions to an education savings (ESA) or 529 plan account?		
4. Did you use any ESA / 529 plan funds to pay for K-12 or college expenses?		
5. Did you use any IRA funds to pay for higher education?		

If you answered Yes to any of these questions, please list the question number and explain:

Purchases, Sales, and Debt Information		
	Yes	No
1. At any time during 2023, did you receive, sell, exchange, or otherwise dispose of any financial interest in any digital assets/virtual currency?		
2. Did you use digital assets to pay for goods and/or services?		
3. Did you sell, exchange, or purchase any real estate?		
4. Did you use any IRA funds for a down payment for a home purchase?		
5. Did you foreclose or abandon any real estate?		
6. Did you refinance a principal residence or second home?		
7. Are you required to pay back the First Time Home Buyer Credit?		
8. Did you buy or sell any stock including cryptocurrency besides retirement accounts (IRA, 401k)?		
9. Did you have any debts canceled or forgiven?		

If you answered Yes to any of these questions, please list the question number and explain:



2023 Tax Questionnaire

Medical Information		
	Yes	No
1. Did you use HSA or FSA (flex spending) funds to pay for medical expenses?		
2. Did you use an HRA reimbursement or any other reimbursement program for medical expenses?		
3. Did you use any IRA funds to pay for medical expenses?		
4. Did you pay long-term health care premiums for yourself or your family?		
5. Did you pay any COBRA health care coverage continuation premiums?		
6. Did you pay for the care of someone else (for example, parents)?		
7. Did you withdraw money from a retirement account to pay for birth or adoption medical expenses?		

If you answered Yes to any of these questions, please list the question number and explain:

Income Information		
	Yes	No
1. Did you earn any income such as tips that is not reported on a tax form?		
2. Did you have any gambling winnings?		
3. Did you receive any payments / distributions from a pension, IRA or 401k plan?		
4. Did you receive any Social Security benefits?		
5. Did you receive any unemployment benefits?		
6. Did you receive any disability income?		
7. Did you receive any trust income as a beneficiary?		

If you answered Yes to any of these questions, please list the question number and explain:

Miscellaneous Information		
	Yes	No
1. Did you make gifts of more than \$17,000 to any individual?		
2. Did you pay any individual as a household employee during the year?		
3. Have you received any unresolved correspondence from the State or the IRS?		
4. Did you incur a casualty loss, theft loss, or any condemnation awards during the year?		
5. If yes, did the loss occur in a Federally declared disaster area?		

If you answered Yes to any of these questions, please list the question number and explain: