

2025  
CLIENT UPDATES



**Please complete this short questionnaire to ensure changes are not assumed or overlooked before we begin your tax return**

Name \_\_\_\_\_

- ◆ **Have you married or divorced since your last filing?** YES NO If yes, please provide new spouse information here:

Spouse \_\_\_\_\_ Birthdate \_\_\_\_\_ SS# \_\_\_\_\_

- ◆ **Please provide BEST phone number and email to contact you.**

Best Phone \_\_\_\_\_ Email \_\_\_\_\_

- ◆ **Any changes to mailing address?** Add updates here:

Mailing Address: \_\_\_\_\_ City/State/Zip \_\_\_\_\_

- ◆ **How many different W-2's are you uploading?** \_\_\_\_\_

- ◆ **How many different 1099's are you uploading?** \_\_\_\_\_

- ◆ **Do you have Marketplace Insurance (Obama Care)?** \_\_\_\_\_ \*If yes, you will need to upload your 1095-A

- ◆ **Have you formed any LLCs?** \_\_\_\_\_ **Corporations?** \_\_\_\_\_

- ◆ **Have you added any children to your household since your last filing?** If yes please provide new dependent information here:

Name \_\_\_\_\_ Birthdate \_\_\_\_\_ SS# \_\_\_\_\_

Name \_\_\_\_\_ Birthdate \_\_\_\_\_ SS# \_\_\_\_\_

- ◆ **How many children are you claiming?** \_\_\_\_\_ \*If claiming a child that who works, make sure they have not already filed.

- ◆ **List children you are claiming here:**

Name \_\_\_\_\_ Name \_\_\_\_\_ Name \_\_\_\_\_

Name \_\_\_\_\_ Name \_\_\_\_\_ Name \_\_\_\_\_

- ◆ **If you anticipate a refund please provide your banking information:**

Bank name: \_\_\_\_\_

Routing Number: \_\_\_\_\_

Account Number: \_\_\_\_\_