

CLIENT INFORMATION 2023
PLEASE PRINT

SECTION A: Personal Information (Thank you for completing ALL information requested)

	<u>Taxpayer</u>	<u>Spouse</u>
Legal Name:		
Occupation:		
Date of Birth:		
Social Security #:		
Home/Cell Phone		
Email Address		
Mailing Address:		
	City:	State: Zip Code:

SECTION B: Dependent(s)

Full Legal Name	Social Security #	Date of Birth	Relationship

SECTION C: Were you or your dependent(s) enrolled in college in 2023?

Student Name	1098-T Provided to us?	Freshman, Sophomore, Junior or Senior?

Did you use your vehicle for business or rental purposes in 2023? YES NO
 If you sold any Real Estate in 2023, please provide documentation.

Was your health insurance purchased through the Marketplace? YES NO If yes, please provide 1095-A.

Purchase price of items bought without Alabama sales tax _____

What was your marital status on 12/31/2023? _____

Who is the primary contact person? _____

Preferred Method of Contact: HOME PHONE CELL PHONE EMAIL

Preferred Method to Receive Tax Returns PAPER COPY PORTAL ON OUR WEBSITE

If you are receiving a refund and wish to have it Direct-Deposited, please provide a copy of a check

Please sign:

Taxpayer _____ Date _____
 Spouse _____ Date _____

****PLEASE NOTE: WE CANNOT BEGIN PREPARATION OF YOUR TAX RETURNS
 UNTIL THIS FORM IS RETURNED TO US**