

Client Questionnaire

Name: _____

Date: _____

(Best) E – Mail address			
(Best) phone number(s) <i>(Will be used to call for questions and for pick up.)</i>			
PLEASE ANSWER ALL QUESTIONS	Yes	No	Use this column for updates
Address changed from last year?			Write your new address here.
Any CHANGES to Bank (from last year) for direct deposit? (Please provide if we do not have it.)			Bank name: _____ <i>checking or savings?</i> Routing number: Acct number:
Any changes in dependents? Birth/death/marriage/etc., <i>If adding, provide name and birthdate.</i>			Will need Death Certificate if applicable.
Were you in the Healthcare Marketplace and receive a 1095A?			If you were in the healthcare marketplace we need the form 1095A.
Did you make any estimated tax payments? <i>If so, must have dates of each payment to Federal and State. Use back if necessary.</i>			
Would you like to know the tax benefits of contributing to an IRA?			Your preparer will let you know how much you are eligible to contribute and how much money you will save on taxes!
Any UNEMPLOYMENT? (If so, we need MI 1099G)			
Did you have money in any foreign banks?			If yes, was it more than \$10,000?
Did you receive, sell, send, exchange, or have any financial interest in digital assets or currency? (Like Bitcoin/NFT's)			
Any child/dependent care expenses?			Will need name/address of provider.
Any college tuition or student loan interest paid?			If so, we need the 1098-T or the interest payment statement 1098-E
<ul style="list-style-type: none"> • Do you have an HSA? (Health Savings Account) • Would you like to know the tax benefits of contributing more if qualified to? 			If so, did you use all distributions for qualified medical expenses? _____
Do you pay for medical insurance of any kind (besides Medicare or employer provided)?			If so, we need to know how much. This includes medical, dental, vision insurance etc.
(CIRCLE ONE): Did you OWN your home, RENT , (or live with parents?)			(Need landlords name and address and monthly rent amounts.) Use back...
Did you have any energy improvements made to your main home that you own? (windows, furnace, a/c, insulation, hot water heater, etc.)			Describe with price: (if not in paperwork)
Did you make any contributions to Michigan Education Savings Plans?			If so, we need your statement of contributions.
Any gambling income? Losses?			Must have your W2Gs to report gambling winnings. And Loss documents.

- **Need driver's license info!** Please write the license number, issue date, and expiration date.

New Clients: We need copies of 1) your previous year's tax returns, Federal & State 2) your driver license, and 3) please write all birthdates with names (use back if necessary).

- Please make sure that any dependents you are claiming did not claim themselves on their tax return.