

<u>Taxpayer Info</u>			
SSN:		DOB	
First Name:		Last	
Occupation:			
Phone Number:		Cell Number:	
Email:			

<u>Spouse Info</u>			
SSN:		DOB	
First Name:		Last	
Occupation:			
Phone Number:		Cell Number:	
Email:			

<u>Address Info</u>	
Street	
City, State, Zip	

<u>Bank Account Info</u>	
Bank Name	
Routing Number	
Account Number	

<u>Dependents</u>			
Full Name	DOB	SSN	Childcare "Yes/No"

Questions	Yes/No/NA
Have you transacted in Cryptocurrencies or digital assets?	
Dependents are your biological children and lived with you > 6 months?	
Dependents are US citizens, have valid SSNs, and you provide majority support?	
Have any tax credits ever been reduced or disallowed to you by the IRS?	
Do dependents address match your address on: <span style="float: right;">School Records, Healthcare/Medical Records</span>	

<u>If Dropping Off</u>	
We call to discuss your tax results, but for an additional fee, you can sign electronically and have your return mailed back to you. Is this something you're interested in?	