

Date:

**Name:**

**Cell / Work #** \_\_\_\_\_

**Email** \_\_\_\_\_

**Home Street** \_\_\_\_\_

**City, State, Zip** \_\_\_\_\_

**Landline** \_\_\_\_\_

**Spouse:**

**Cell / Work #** \_\_\_\_\_

**Email:** \_\_\_\_\_

*(Office Use Only):*

| Date  | Start | Stop  |       |
|-------|-------|-------|-------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
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| _____ | _____ | _____ | _____ |

**1. How would you like your completed return?**

**Mailed**  or **Pick-up**  or **Email with DocuSign**

2. Direct deposit info: Same as last yr: \_\_\_\_\_ or Bank Routing # \_\_\_\_\_ Checking # \_\_\_\_\_

3. Would you like any taxes that are due *automatically withdrawn* from your bank account? \_\_\_\_\_

4. Did you collect any unemployment last year? \_\_\_\_\_

5. Did you have a financial interest in or signature authority over any foreign financial acct at any time last year? \_\_\_\_\_

6. Did you contribute to or take a distribution from a 529 Plan (Education Savings Account) last year? \_\_\_\_\_

7. Did you or do you plan to contribute to a traditional IRA or Roth IRA for last year? \_\_\_\_\_

8. Did you file a New York return? \_\_\_\_\_ If yes, did you renew your driver's license last year? \_\_\_\_\_

9. Did you make any estimated tax payments last year? \_\_\_\_\_

10. Do you have an HSA Plan (Health Savings Account)? \_\_\_\_\_ or FSA (Flexible Spending Account)? \_\_\_\_\_

11. Do you or your spouse have a dependent care (child care) plan at work? \_\_\_\_\_

12. Do you have a home line of credit/home equity? \_\_\_\_\_ If yes, were all of the proceeds used for home improvement? \_\_\_\_\_

13. Do you have an LLC or corporation? \_\_\_\_\_ If yes, did you file your annual report last year? \_\_\_\_\_

14. Did you buy or sell any crypto currency last year? \_\_\_\_\_

15. Do you have any children in private school, K-12? \_\_\_\_\_

16. Are you insured through CT Access Health or the Affordable Care Act (Obamacare)? \_\_\_\_\_

17. Did you buy an electric vehicle or make any energy improvements to your home last year? \_\_\_\_\_

18. Do you receive transfers, loans, paybacks or income from PayPal, Venmo, Stripe, Square, Uber, Door Dash, etc.? \_\_\_\_\_

19. Did you receive a transfer, bequest, or inheritance of \$100,000 or more from a foreign country? \_\_\_\_\_

20. Did you apply for & receive an ERC (Employee Retention Credit) for your business last year? \_\_\_\_\_

File Name \_\_\_\_\_ Tax Year \_\_\_\_\_ File Name \_\_\_\_\_ Tax Year \_\_\_\_\_