



TAXPAYER INFORMATION		☐ check if primary contact	SPOUSE INFORMATION		☐ check if primary contact
NAME (First, Initial, Last Name)			NAME (First, Initial, Last Name)		
SSN on file	Date of Birth on file		SSN on file	Date of Birth on file	
Mailing Address		Apt #	City	State	Zip
Occupation		Disabled	Occupation		Disabled
Cell Phone	Alternative Phone		Cell Phone	Alternative Phone	
Email Address			Email Address		
How would you like to be contacted? ☐ Email ☐ Phone ☐ Text			Best time to contact?		

Filing Status - Check the filing status that applies to you:

- Single** If: You were NOT married on or before December 31st and if applicable your dependents lived with you less than 6 months during the year
- Married Filing Joint** If: You were married as of December 31st, or your spouse died during the year
- Married Filing Separate** If: You were married on or before December 31st and your spouse is filing a tax return using this filing status and you lived apart for the last 6 months of the year
- Head of Household** If: You were NOT married as of December 31st and your child lived with you for more than 6 months of the year
- Qualified Widow(er)** If: Your spouse died during either 2022 or 2023, and your child lived with you for the entire year

DEPENDENT INFORMATION ☐ **NO CHANGE**

First Name, Initial, Last Name	Dependent's SSN	Relationship	# of months in home	Date of Birth	Child Care Expenses	Disabled	College Student

- Did ANYONE in your household have HEALTH INSURANCE through the Marketplace?..... ☐ YES ☐ NO
If yes, please provide FORM 1095-A as this is needed to complete your return.
- Do you have an Identity Protection PIN? If yes, please provide the IRS letter mailed to you with this information..... ☐ YES ☐ NO
- Were you or your spouse ACTIVE Military?..... ☐ YES ☐ NO
- Did you have any Foreign Financial Accounts?..... ☐ YES ☐ NO
- Did you have any digital assets or NFT(Crypto Currency)?..... ☐ YES ☐ NO

REFUND INFORMATION

How would you like to receive your refund? ☐ Direct Deposit ☐ Standard Mail (Check)

Bank Information: Bank Name:_____ ☐ Checking ☐ Savings ☐ **NO CHANGE**

Routing # _____ Account # _____