

All clients must complete the following information:

Date

****Do not assume information has carried forward from prior years****

Taxpayer Name			Social Security Number	
Spouse Name			Social Security Number	
Taxpayer Driver's License Number	Date of Birth	State of Issue	Date Issued	Expiration Date
Spouse Driver's License Number	Date of Birth	State of Issue	Date Issued	Expiration Date
Address			Phone Number	
City, State, Zip			Email address	
Preferred Contact Method (Please Circle One)		Email	Phone	How do you want your tax return copy: Paper Electronic (PDF) Both
Would you like to discuss your return? If so, would you prefer (Please Circle One)		Phone Call	Virtual Meeting	

Children & Other Dependents

Dependent Name/Relationship	Months in Home	Date of Birth	Social Security Number
Dependent Name/Relationship	Months in Home	Date of Birth	Social Security Number
Dependent Name/Relationship	Months in Home	Date of Birth	Social Security Number
Dependent Name/Relationship	Months in Home	Date of Birth	Social Security Number

Additional Information

Did you purchase your health insurance from **MNsure**? (If Yes, provide 1099-A) Yes No

Did you get married during the year? (If Yes, add spouse information above) Yes No

Did you become separated/divorced during the year? (If Yes, note dates below) Yes No

Date Divorce Finalized (Provide decree if applicable)

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Date Separated

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Did you make any energy efficient improvements to your home? (If Yes, please bring info with) Yes No

Did you receive the MN Frontline Worker Payment of \$487.45? Typically received Oct-Dec. Yes No

Did you open or close a business? (If Yes, we may need to discuss further) Yes No

Do you have brokerage-type investments? (If Yes, provide a Year End 1099 Summary) Yes No

Did you purchase or sell any property? (If Yes, provide a closing/settlement statement) Yes No

Did you receive, sell, exchange, or otherwise dispose of any financial interest in virtual/crypto currency? Yes No

Direct Deposit Information

Bank Name	Routing Number	Account Number
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(Circle One)

Checking

Savings