

EXISTING CLIENTS UPDATE INFORMATION

Today's

date _____

Please fill out front and back

Primary	Taxpayer Full Name _____	Phone _____
	Occupation _____	Email _____

Spouse	Full Name _____	Phone _____
	Occupation _____	Email _____

Marital Status on Dec 31

Never Married
 Married
 Divorced
 Widowed
 Separated
 Date of Separation _____

Mailing Address

Dependent Changes Removing or Adding

<i>Name</i>	<i>DOB</i>	<i>If adding new child Please also provide date of birth and SSN</i>	Relationship Son, daughter etc.	Months lived in home in 2022	Full time student	Disa- bled

YES / NO **Were you or any family member on Market Place Health Care/ Obama Care at any time during the year 2022?**

Form 1095 -A must be provided or you tax return will be delayed by IRS.

IRS Direct Deposit – Refund direct deposited into your checking account.
Payment due at time of pick up.

IRS Check In the mail – If you do not have a bank account, we can electronically file your tax return and have the IRS send you a check in the mail .
Payment due at time of pick up.

Electronic Refund Check or Deposit – You will pick up the check at TAX CARE or have your money deposited into your account. All fees can be deducted from the refund, so no payment would be required at the time of service.
Additional \$63.95 fee above tax prep fee.

If you choose direct deposit we need to ensure correct direct deposit account information each year.

Bank name, routing and account numbers are needed.

Please provide us with a voided check not a deposit slip.

Please specify if checking or savings account. We need this information before being able to prepare your return if you choose direct deposit.