



# CLIENT INFORMATION SHEET TAX YEAR 2023

**Please answer all questions and sign the bottom.**

➤ **Client Name:** \_\_\_\_\_ **Phone Number:** \_\_\_\_\_

➤ **Email Address:** \_\_\_\_\_

➤ **Spouse Email Address:** \_\_\_\_\_

➤ **Address:** \_\_\_\_\_ **City:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

➤ **Has your marital status changed since last year?**    **YES**    **NO**

➤ **Are you adding or removing any dependents?**    **YES**    **NO** (If yes please fill in the info below)

FIRST NAME	LAST NAME	SS NUMBER	DOB	RELATIONSHIP TO YOU	ADD/REMOVE

➤ **Did you receive unemployment compensation this year?**    **YES**    **NO**  
(If yes, please make sure you have your 1099-G form printed or electronically submitted to us)

➤ **Did you sell or trade bitcoin, dogecoin, or crypto-currency?**    **NO**    **YES** - If yes, you must have a 1099-B from your broker. Please submit that to us.

➤ **Did you start a "side gig" business driving for Lyft, Uber, Doordash, Instacart, etc?**    **YES**    **NO**

➤ **How would you like your refund? (PLEASE CIRCLE ONE)**    CHECK MAILED    DIRECT DEPOSIT

➤ **Has your bank account information changed?**    **Yes**    **No** (If yes please fill in the info below)

NAME OF BANK \_\_\_\_\_ PERSONAL/BUSINESS    CHECKING/SAVINGS

ROUTING# \_\_\_\_\_ ACCOUNT# \_\_\_\_\_

➤ **All of our clients have access to a secure client portal where you can obtain copies of your income tax return for this year and years prior if filed with us. Look out for an email from our staff. Would you still like a paper copy printed of your return?**    **YES**    **NO**

### TERMS OF ENGAGEMENT

We will prepare your Federal and State income tax returns as requested using information you provide. We may ask for clarification of some items, but we will not audit or otherwise verify the information you provide us. It is your responsibility to provide all the information required for preparation of complete and accurate tax returns. You should retain all documents, canceled checks, and other data that support your reported income and deductions. These may be necessary to prove the accuracy to a taxing authority. You have the final responsibility for your income tax returns, and therefore, you should review them carefully before you sign them.

*All the information I have given is true and correct to the best of my knowledge. I acknowledge that by signing this form no personal information has changed for me (or my spouse), including who I can claim as a dependant and I understand it is solely my responsibility to inform Action Tax Service prior to the preparation of my tax return if any personal information has changed. I also agree to and accept the Terms of Engagement.*

*Taxpayer Signature:* \_\_\_\_\_ *Date:* \_\_\_\_\_