| HOW DID YOU HEAR ABOUT US? | |
|-----------------------------------|--|
| | |

(Please identify if there's a preferred contact person or preferred method of contact)

| CLIENT INFORMATION — Provide copy of Driver's License | | | | |
|---|---|-------------------------------------|---|--|
| Taxpayer Name: | | Spouse Name: | | |
| SSN: | | SSN: | | |
| Date of Birth: | | Date of Birth: | | |
| Phone: Opt in to text | *Messaging and Data rates may apply *Text "Stop" to opt out | Phone: Opt in to text | *Messaging and Data rates may apply *Text "Stop" to opt out | |
| Email: | | Email: | | |
| Address: | | | | |
| City: | State: | | Zip: | |
| DEPENDENTS — Provide copy of Soc Sec Card when possible | | | | |
| First Name: | | First Name: | | |
| *Last Name (if different): | | *Last Name (if different): | | |
| Date of Birth: | 1 | Date of Birth: | | |
| SSN: | | SSN: | | |
| Relationship & # months in home: | | Relationship & # months in home: | | |
| First Name: | | First Name: | | |
| *Last Name (if different): | | *Last Name (if different): | | |
| Date of Birth: | | Date of Birth: | | |
| SSN: | | SSN: | | |
| Relationship & # months in home: | | Relationship & # months in home: | | |

**Note: GA permits a parent to claim an exemption for an unborn child with a detectable human heartbeat (even if the pregnancy later resulted in a miscarriage or stillbirth). Please let us know if you qualify to claim the exemption or if you have any questions regarding it.

BANKING INFORMATION — Provide copy of check to reduce chance of errors

* Direct Deposit/Debit helps discourage fraud and remains the simplist, safest & most convenient way to receive or submit payment. If not utilizing Direct Debit, consider making payments online at IRS.gov and/or State Gov't Websites. Direct Deposit: Yes / No **Direct Debit W/D:** Yes* / No. *List if preferred w/d date: a. Bank Name: **Type:** Checking / Savings / Money Mkt / Other b. Routing Number: c. Account Number: OTHER MISCELLANEOUS ITEMS If separated, live apart the last 6 mos of yr? Yes / No 1. Filing Status: Single / HOH / Dep of Another / MFJ / MFS 2. Receive unemployment? *If yes, provide Form 1099-G Yes* / No 3. Marketplace Insurance? *If yes, provide Form 1095-A Yes* / No 4. Foreign Accts? Yes* / No *If yes, was aggregate value > \$10,000 at any time during year? Yes / No 5. Receive, sell, exchange, or dispose of virtual currency ("digital" representation of value vs "real" dollars)? Yes / No - If you: solely made purchases utilizing US or foreign currency; simply held digital assets in a wallet/acct; or merely transferred them between accounts that you own - you'll answer "no" to this question. ***PLEASE READ*** As technology expands, going digital has become a necessity. The overall increase in efficiency through client collaboration along with helping to save space, money, and the environment makes embracing it crucial to individuals and businesses alike. To address future regulations and to provide readily accessible information to clients securely, our office default moving forward will be to provide documents electronically thru our secure online client portal. Should you choose not to use the portal or are unable to, please inform us of your need for a printed copy.