

ACCUplus Financial Services, Inc.

Client Tax Return Information

Please **PRINT YOUR NAME** and only indicate **CHANGES** in tax info for 2023 tax return.

Name: _____ Spouse's Name: _____

SS # _____ Spouse SS# _____

Occupation: _____ Spouse's Occupation: _____

Date of Birth: _____ Spouse Date of Birth: _____

Address: _____

Best # to reach you at: _____

E-mail : _____ Spouse E-mail : _____

Did someone refer you to our office? _____

1) Any changes in filing status? _____ Any new dependents? _____

2) Do you own or rent your home? _____

3) Do you have an IRS Identity Protection ID #? _____

4) Any charitable contributions? _____

5) Did you receive any Unemployment/PFML? Yes _____ No _____

6) Same direct deposit account as last year? Yes _____ No _____

If different, please provide updated information.

7) Any energy efficient improvements to your home? If yes, describe and amount spent.

For Office Use Only-

Date Received - ____ / ____ / ____ Staff Initials _____

Drop Off / Mail / Email / Online Portal

Given to Preparer - _____ Staff Initials _____