

2022 Client Confirmation Form

Name: _____ Spouse Name: _____

Phone: _____ Spouse Phone: _____

Email: _____ Spouse Email: _____

During 2022, did you...

Yes No Did you **move in 2022**? If so, NEW MAILING ADDRESS? _____

If so, what was the **date of move** in 2022? _____

Yes No **BUY or SELL** real estate in 2022? (Bring closing paperwork.)

Yes No **REFINANCE** a mortgage in 2022? (Submit closing disclosure/settlement statement.)

Yes No **START A NEW JOB** in 2022? If so, explain: _____

Yes No Have any **NEW INCOME / SIDE BUSINESS startup**? If so, explain: _____

Yes No Invest in any **CRYPTOCURRENCY**?

Yes No Did you buy **HEALTH INSURANCE** on the **MARKETPLACE WEBSITE / HEALTHCARE.GOV**? (Submit 1095-A)

Yes No Did your **DEPENDENTS** change (new baby? child leave home? etc.) _____

Yes No Did each **DEPENDENT live with you all year** (except for time away at college)?

Yes No Did your **MARITAL STATUS** change? If so, explain: _____

Any other notes? Do you expect any changes in 2023?

If you get a refund...

Deposit to **same account as last year**

Deposit to this account:

Bank Name: _____

Routing #: _____

Account #: _____

Account Type: Checking Savings

Mail me a check

Apply forward as a credit to my 2023 taxes

If you owe taxes...

← Setup direct debit from **same account as deposit**

Setup electronic payment from this bank account:

Bank Name: _____

Routing #: _____

Account #: _____

Account Type: Checking Savings

Process payment:

When I sign forms **OR**

On the deadline: **Tuesday 04/18/2023**

***Nothing is debited until you review your tax return and sign your e-file forms. Debits have a separate authorization form, showing debit date.

I will mail a check or set up my own payment at [IRS.gov/payments](https://www.irs.gov/payments) or [MyAlabamaTaxes.alabama.gov](https://www.MyAlabamaTaxes.alabama.gov)

I signify that I have provided (or agree to provide) a document for every type of income I had this year, and the above information is accurate to the best of my knowledge. SIGNATURE: _____ DATE: _____