

# Client Update Sheet



Taxpayer name \_\_\_\_\_ Spouse's name \_\_\_\_\_ Date \_\_\_\_\_

Who is the **primary contact** for questions about your tax return? (**Choose one**): Taxpayer Spouse Other \_\_\_\_\_

Primary contact phone number \_\_\_\_\_ Email \_\_\_\_\_

## Changes since your last tax return (if any):

Address \_\_\_\_\_ City, State, Zip \_\_\_\_\_

Phone (2<sup>nd</sup> contact person) \_\_\_\_\_ Email (2<sup>nd</sup> contact person) \_\_\_\_\_

New employer or occupation (taxpayer) \_\_\_\_\_ New employer or occupation (spouse) \_\_\_\_\_

Marital status on Dec. 31, 2020 \_\_\_\_\_ Other changes \_\_\_\_\_

## During 2020, did you:

1. Have a new baby, a child that left home, or other changes in your dependents? Y N
2. Live with each of your dependents all year (except for time away at college)? Y N NA
3. Buy or sell any real estate? Y N
4. Refinance a mortgage? Y N
5. Have **any** health insurance from healthcare.gov ObamaCare? Y N
6. Were you impacted financially by COVID-19? Y N
7. Are you sure we have a document for every type of income you had this year? Y N
8. Are there any new sources of income (investments, Social Security, unemployment, etc.)? \_\_\_\_\_
9. Can you think of anything else that might affect your 2020 taxes? \_\_\_\_\_

Major changes expected in your 2021 tax situation (if any): \_\_\_\_\_  
\_\_\_\_\_

## Refund (check one):

Mail me a **paper check**

Direct deposit to **same account as last year's refund**

Direct deposit to this bank account:

## If there is a Balance Due (check one):

I will mail in a **paper check**

Please contact me about electronic payment options

Bank name \_\_\_\_\_

Account Type (**Choose one**): Checking Savings

Account number \_\_\_\_\_

Routing number (9 digits) \_\_\_\_\_

## Notes

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