

## 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 or 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:** \_\_\_\_\_