

2023 Client Confirmation Form

Name: _____ Spouse Name: _____

Phone: _____ Spouse Phone: _____

Email: _____ Spouse Email: _____

Primary Contact: Me My Spouse

Preferred Contact Method: Phone Email Text

Yes No Did you **move in 2023**? If so, NEW MAILING ADDRESS? _____

If so, what was the **date of move** in 2023? _____

Yes No Did you **BUY or SELL real estate** in 2023? (If so, bring closing paperwork.)

Yes No Did you **HAVE A NEW EMPLOYER** in 2023? If so, explain: _____

Yes No Did you have any **NEW INCOME SOURCES** in 2023? If so, explain: _____

Yes No Did you invest in **CRYPTOCURRENCY** in 2023? (If so, bring closing paperwork.)

Yes No Did you buy **HEALTH INSURANCE** on the **MARKETPLACE WEBSITE / HEALTHCARE.GOV** in 2023? (Submit 1095-A)

Yes No Did you have **SIGNIFICANT OUT-OF-POCKET MEDICAL** in 2023? (Only send summary if total is more than 4% of your AGI)

Yes No Did your **MARITAL STATUS** change in 2023? If so, explain: _____

Yes No Are you claiming **DEPENDENTS** in 2023? _____

IF YOU HAVE DEPENDENTS IN 2023:

Yes No Did any of your **DEPENDENTS** change? *****IF NEW BABY: List legal name, SSN, and DOB.**

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

Yes No Did you include each **DEPENDENTS** residency proof with their name & your mailing address?

Any other notes on 2023? Do you expect any changes in 2024?

If you get a refund...

Deposit to **last year's account: LAST 4 DIGITS** = _____

Deposit to a different account:

Bank Name: _____

Routing # _____

Account # _____

Account Type: Checking Savings

Mail me a check

Apply forward as a credit to my 2024 taxes

If you have to pay taxes...

Nothing is debited until you review taxes & sign an authorization form.

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

Setup payment from this bank account:

Bank Name: _____

Routing # _____

Account # _____

Account Type: Checking Savings

When to Schedule Debit:

When I sign forms **OR**

On the deadline: **Monday 04/15/2024**

I will mail a check or setup my own online 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 a document for every type of income I had this year & the above information is accurate my best knowledge.

SIGNATURE: _____ **DATE:** _____