NEW CLIENT WORKSHEET

PLEASE ATTACH A COPY OF BOTH TAXPAYER AND SPOUSE DRIVERS LICENSE OR STATE ID

Name:		Spouse				
Name:		Name:	Name:			
Birthday:		Birthday	Birthday:			
Soc.Sec #		Soc.Sec	Soc.Sec #			
Job Title:		Job Title	Job Title:			
Email:		Email:				
Phone #	Phone #	Phone #				
Filing Status: Sing	le Married Joint	Married Sep	parate Head of	Househol	d	
Address						
WISCONSIN RENT Rent Paid in 2023:		cluded in the re	ent?			
Rent Paid in 2023: Dependents (please)	Was Heat Inc	es if needed)		College	Studen	
Rent Paid in 2023: Dependents (please)	Was Heat Inc		ent? Relationship	College	Studen	
Rent Paid in 2023: Dependents (please)	Was Heat Inc	es if needed)		College	Studen	
Rent Paid in 2023: Dependents (please)	Was Heat Inc	es if needed)				
Rent Paid in 2023:	Was Heat Inc	es if needed)		Yes	No	

- Did you have marketplace insurance in 2023?
 - o Please provide form 1095-A
- Did you sell or trade any virtual currency in 2023?
 - o Please provide us the 1099B form for all sales and trades
- Did you receive unemployment benefits in 2023?
 - o Please provide form 1099-G
- Did you or your child attend college in 2023?
 - o Please provide us form 1098-T for each student

Additional Information						