

RETURNING CLIENT INFORMATION

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

Taxpayer

Spouse

Name:	Name:
Email:	Email:
Phone #	Phone #

Is it ok to text?

Is your filing status the same as last year

Do you live at the same address as last year?

If not please provide address below

1. **What is the primary purpose of the study?**

WISCONSIN RENTERS ONLY

Rent paid last year:

Was heat included in the rent?

Dependents: Please provide NEW dependents information below

Name Social Security # Birthday Relationship College Student

				Yes	No
				Yes	No
				Yes	No
				Yes	No

Are you removing any dependents from your return last year?

If yes, please provide below

Is your bank account for direct deposit the same as last year?

If not, please provide new bank account information below

Bank Account Direct Deposit Information

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

Additional Information