

## **NEW CLIENT WORKSHEET**

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

## Taxpayer

## Spouse

Name:	Name:
Birthday:	Birthday:
Soc.Sec #	Soc.Sec #
Job Title:	Job Title:
Email:	Email:
Phone #	Phone #
Filing Status: <input type="radio"/> Single <input type="radio"/> Married Joint <input type="radio"/> Married Separate <input type="radio"/> Head of Household	

Is it ok to TEXT?

## Address

## **WISCONSIN RENTERS ONLY**

Rent Paid:  Was Heat Included in the rent?

**Dependents (please attach additional pages if needed)**

Name Social Security # Birthday Relationship College Student

				Yes	No
				Yes	No
				Yes	No
				Yes	No

## Bank Account Direct Deposit Information

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

## Additional Information