

2018 TAX YEAR CLIENT UPDATE

PLEASE COMPLETE FORM AND RETURN IT WITH YOUR TAX DOCUMENTS. THANK YOU.

Your name: _____ **Spouse's name:** _____

Drivers Lic # _____ State: _____ Issue Date: ___/___/___ Exp Date: ___/___/___

Spouse's Lic # _____ State: _____ Issue Date: ___/___/___ Exp Date: ___/___/___

Were there any changes in your marital status during 2018? No ___ Yes ___

Address: ___ Same as tax year 2017

___ New Address: _____

Please circle the way you would prefer us to contact you with questions and information.

PHONE #: _____ CELL #: _____

TEXT #: _____ EMAIL: _____

DEPENDENTS: ___ Same as tax year 2017 ___ Changes noted below:

Add / Delete Name _____ SSN _____ - _____ - _____ DOB ___/___/___

Add / Delete Name _____ SSN _____ - _____ - _____ DOB ___/___/___

REFUND DIRECT DEPOSIT INFORMATION

If you receive a refund, would you like it to be directly deposited into your bank account?

___ Yes ---> Name of Bank: _____

___ Checking or ___ Savings

Routing #: _____

___ No Acct #: _____

Here is a short list of things you need to mail or bring in IF you have received them:

- W-2s from employers
- 1099s for interest, dividends, sales of stock, unemployment, state tax refunds, miscellaneous income or cancellation of debt
- **Important:** Forms 1095-A, 1095-B or 1095-C for those who have health insurance
- 1098 for mortgage interest or 1098-T tuition statement
- Student Loan Interest statements
- K-1s from Partnerships, S-Corporations, Estates or Trusts
- Property tax statements
- Closing documents from any real estate transactions
- Brokerage statements **Please note:** If you sold stock in 2018, we will need to know the date of purchase and original price paid.
- Any correspondence received from the IRS or from state taxing agencies.

Please note: If you intend to claim mileage deductions for business, medical or charitable expense **please use the form on the reverse side of this page.**