

## 2021 TAX YEAR CLIENT UPDATE

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

Your name: \_\_\_\_\_ Spouse's name: \_\_\_\_\_

Address: \_\_\_\_\_ Same as tax year 2020  
\_\_\_\_\_ 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 2020 \_\_\_\_\_ Changes noted below:

Add / Delete Name \_\_\_\_\_ SSN \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ DOB \_\_\_\_/\_\_\_\_/\_\_\_\_

Add / Delete Name \_\_\_\_\_ SSN \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ DOB \_\_\_\_/\_\_\_\_/\_\_\_\_

If you received Advance Child Tax Credit payments, please provide a copy of Letter 6419.

**ECONOMIC IMPACT PAYMENT #3/STIMULUS:** Amounts: \$ \_\_\_\_\_

Please provide a copy of Letter 6475.

### **REFUND DIRECT DEPOSIT INFORMATION**

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

\_\_\_\_\_ No \_\_\_\_\_ Yes

If you owe tax, would you like this tax directly debited from your bank account?

\_\_\_\_\_ No \_\_\_\_\_ Yes

Name of Bank: \_\_\_\_\_ \_\_\_\_\_ Checking or \_\_\_\_\_ Savings

Routing #: \_\_\_\_\_ Acct #: \_\_\_\_\_

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

- W-2s from employers
- Letter 6475 showing Economic Impact Payment sent
- 1099s for interest, dividends, sales of stock, unemployment, state tax refunds, miscellaneous income, or cancellation of debt
- Letter 6419 showing the total of Advance Child Tax Credit payments sent
- **Important:** Form 1095-A for those who have health insurance through Healthcare.gov
- 1098 for mortgage interest or 1098-T tuition statement
- K-1s from Partnerships, S-Corporations, Estates or Trusts
- Property tax statements
- Closing documents from any real estate transactions
- Brokerage statements
- 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.**