

Client Information Update for Tax year 2022

Primary Taxpayer Name _____ Birthdate _____

Phone # _____ Email _____

Address _____

Driver's license# _____ State _____ Issued _____ Expires _____

Secondary Taxpayer Name _____ Birthdate _____

Phone # _____ Email _____

Address _____

Driver's license# _____ State _____ Issued _____ Expires _____

Bank Information

Bank Name _____ RT# _____ ACT# _____

Checking Savings

Other Questions

Number of Children that you are claiming _____

Number of Children or Other Dependents ADDED to your household in 2022 _____

Did you have Childcare Expenses for any Children or Dependents in 2022? Yes No

Did you or your Spouse/partner receive any Unemployment in 2022? If yes, include

1099-G Yes No

Is anyone in your household Attending College? If yes, include 1098-T Yes No

Did you pay Rent in Indiana? Yes No #Months _____ Total Rent Paid _____

Did you Pay Property Tax in Indiana? Yes No If yes, list total paid _____

Additional Notes you would like to give the Preparer _____

