

Client Information Update for Tax Year 2024

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 Name _____ **checking**

RT# _____ ACT# _____ **savings**

Other Questions

Number of Children that you are claiming _____

Number of Children or other Dependents ADDED to your household in 2024

Did you have childcare expenses for any children or dependents on 2024? **no** **yes**

Did you or your spouse/partner receive any unemployment in 2024? If yes, include 1099-G. **no** **yes**

Is anyone in your household Attending College? If yes, include 1098-T. **no** **yes**

Did you pay rent in Indiana? **no** **yes** # months _____ total rent paid _____

Did you pay property tax in Indiana? **no** **yes** If yes, list total paid _____

Additional notes you would like to give to the preparer: _____
