

# Client Annual Data Form (Tax Year 2023)

Office use only:
Dropped off: _____
Emailed: _____
Portal: _____

Name: \_\_\_\_\_ Date: \_\_\_\_\_ Telephone: (Cell): \_\_\_\_\_  
 (Home) \_\_\_\_\_  
 E-mail: \_\_\_\_\_ (Work/Other) \_\_\_\_\_  
 Address: \_\_\_\_\_ Address change ?  Yes  No

(1) Do you want to ADD(+)/REMOVE (-)dependents?

(+)  (-)  N/A

(If adding, provide birth record and SS card)

Name: \_\_\_\_\_

Name: \_\_\_\_\_

(2) Did you pay for child care in 2023?

Yes  No  N/A

Name of provider: \_\_\_\_\_

Address: \_\_\_\_\_

Tax ID/SSN: \_\_\_\_\_

**FOR QUESTIONS 3 - 14 INCLUDE YOURSELF AND YOUR SPOUSE, IF MARRIED FILLING JOINTLY**

(3) Did you receive unemployment in 2023?

Yes  No

(4) Did you receive distribution from 401K or IRA?

Yes  No

(5) Did you receive distribution from Social Security?

Yes  No

(6) Did you pay Student Loans?

Yes  No

(7) Did you sell real estate?

Yes  No

(8) Did you purchase real estate?

Yes  No

(9) Did you refinance real estate?

Yes  No

(10) Did you form a business 2023?

Yes  No  N/A

(11) Do you have a foreign bank account/Virtualcurrency?

Yes  No

(If yes, is the balance 10,000USD or more?) Yes  No  N/A

(12) Did you have debt cancellation in 2023?

Yes  No

(13) How many jobs did you have in 2023? \_\_\_\_\_

(14) Are you a U.S. Veteran who lives in NJ?

Yes  No

(15) Did you have health insurance in 2023?

(Taxpayer) Yes  No  Partial

(Spouse) Yes  No  Partial  N/A

(Dependents) Yes  No  Partial  N/A

(16) Did you get married/divorced/separated in 2023?

Yes  No  (If yes, please provide the date) \_\_\_\_\_

(17) How will you pay for our services?

(Fees must be paid before e-file or delivery)

Cash  Check  Credit/Debit Card

Deducted from refund (extra bank fees are incurred)

(18) How would you like to receive your refund?

IRS Check (*by mail* in 4-5 Weeks) -----

Office Pickup - **Fees Must be deducted** (*office* in 2-3 weeks) -----

Direct Deposit (in your account 2-3 weeks) -----

(19) Did your bank information change for direct deposit?

(If yes, please provide copy of voided check)

Yes  No  N/A

(20) How would you like to receive your tax return copies?

Portal  Paper  Mail  (USPS Priority Fees apply).

**Note: Additional copies will cost \$25.00**