

## 2022 RETURNING CLIENT WORKSHEET

**\* PLEASE FILL OUT BOTH SIDES OF THIS FORM IN ADVANCE TO ENSURE WE HAVE THE CORRECT INFORMATION. INCLUDE WITH DOCUMENTS, DO NOT MAIL IN SEPARATELY\***

### Taxpayer's Info

### Spouse's Info

Name		
Date of Death (if applicable)		
Occupation (if changed)		
Phone Number		

**\*If newly married (2022 or 2023), please include spouse's birthday and SSN**

### **Driver's License or Other State Issued ID Information:**

Number		
State Issued		
Issue Date (iss)		
Expiration Date (exp)		

Did you move in 2022? Yes  No  If yes: Date of Move \_\_\_\_\_

New Address \_\_\_\_\_

New School District \_\_\_\_\_ New Municipality \_\_\_\_\_

### **Dependent(s) Information (if applicable; list additional dependents on a separate page if necessary):**

<u>Name</u>	<u>Relationship*</u>	<u>Full Time College Student</u>	<i>(Only need if born in 2022)</i>	
			<u>DOB</u>	<u>SSN</u>
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		

**\*If child, please indicate Daughter (D) or Son (S)**

**\*\*Please include any children born in 2022; Please only include the dependents you choose to claim**

## 2022 RETURNING CLIENT WORKSHEET

**Refund/Balance Due:**

For Refunds:            Direct Deposit       OR        Check Mailed

For Balance Due:        Direct Debit           OR        Mail in Voucher w/ Check

If Direct Deposit or Direct Debit was chosen, please fill in the bank information so we can make sure we have the correct account:

Routing Transit Number (9 digits) \_\_\_\_\_

Account Number \_\_\_\_\_

Type of account                               Savings                                Checking

**Did you purchase health insurance through The Healthcare Marketplace (Pennie)?**

Yes  (If yes, include Form 1095-A)           No

**Have you (or your spouse if applicable) had an Identity Protection PIN in the past?**

Taxpayer:       Yes  (If yes, please include the PIN or letter from the IRS)           No

Spouse:       Yes  (If yes, please include the PIN or letter from the IRS)           No

**Has your filing status changed since last tax season?**

No        Yes        If yes, please indicate: Single        Head of Household   
Married Filing Separate        Married Filing Joint

**How would you like your personal copy of your tax return?**

Hard, paper copy (packaged like usual)        Digital, PDF copy (flash drive or ShareFile)

**Other Notes or Questions:**

---

---

---

I certify that the information provided on the taxpayer worksheets is complete and accurate:

Taxpayer Signature: X\_\_\_\_\_ Spouse Signature: X\_\_\_\_\_