



CLIENT INFORMATION SHEET

HAVE YOU RECEIVED AND SIGNED OUR ENGAGEMENT LETTER? Yes or No (a copy will be sent) no services will be provided until this is signed. I will need a copy of your current ID.

Name: _____ DOB ____/____/____ SS# ____ - ____ - ____

Spouse: _____ DOB ____/____/____ SS# ____ - ____ - ____

Address: _____ (new) (same)

Phone: _____ Email: _____@_____

Profession: Tax Payer _____ Retired: Yes No
Self Employed (1099): Yes No Schedule C: Yes No

Profession: Spouse _____ Retired: Yes No
Self Employed (1099): Yes No Schedule C: Yes No

Dependents:

#1 Name: _____ DOB ____/____/____ SS# ____ - ____ - ____

Relationship: _____ Student: Yes No Lives with you? Yes No

#2 Name: _____ DOB ____/____/____ SS# ____ - ____ - ____

Relationship: _____ Student: Yes No Lives with you? Yes No

#3 Name: _____ DOB ____/____/____ SS# ____ - ____ - ____

Relationship: _____ Student: Yes No Lives with you? Yes No

Can anyone else claim one or more of these dependents? Yes No (Please indicate which one)

If so is there an Agreement in place for your or someone else to claim any of these dependents? Yes No

Did you file a prior year tax return? Yes No If yes, please provide a copy unless TMD Services LLC did your 2022 return

Did you purchase a car, house, boat or other big ticket item last year? Yes No If yes, please provide a copy of Sales Contract.

If owed Taxes for prior years to the IRS or State? If so, Did you pay them? \$_____

Did you buy or sell Cryptocurrency? If yes, amount: \$_____

How are you paying for your Return? Cash, Check, Credit Card (add3%); if deducted from your refund, additional fees will need to be paid.

Client Initials: _____

Bank Name: _____ Routing # _____ Acct: _____ (for Direct Deposit)