

**Green CPA, PLLC
Returning Client Update Sheet**

Personal Information

Taxpayer Name _____ Spouse Name _____
 Address _____ City _____ State _____ Zip _____
 Taxpayer Phone _____ Spouse Phone _____
 Taxpayer Email _____ Spouse Email _____

Did your filing status change for 2023?

Married _____ Divorced _____ Dependent(s) Move In/Out of House _____

Update Your Information

Dependent Information

Has any dependent info changed since last year? YES NO
 Are you claiming all the dependents from last years return? YES NO

Please provide info on **NEW** dependents:

Dependents Name (First, Middle, Last)	Relationship	Social Security Number	DOB	Months Lived With You

Health Insurance

Did anyone on your return have health insurance through the Marketplace? YES NO

If YES, please provide your 1095A.

Banking Information

Please provide banking information

Bank _____
 Routing Number _____
 Account Number _____

Account Type Business Checking Checking Savings

Questions

In 2023 did you receive, sell, send, exchange or otherwise acquire and financial interest in virtual currency? YES NO

Miscellaneous

To avoid penalties, we recommend paying any taxes owed by direct debit. To **OPT OUT** check the box.

We will send your signature documents to you via Encyro. If you wish to **OPT OUT** check the box.

Office Use Only

IAN Personal Business Opt-In Opt-Out If Opt-In, Membership Fee _____

Fee must be paid before or at your appointment time

Agreed Payment Type Cash Check Credit/Debit

Amount _____ Initial _____ Date _____